

WORLD PRESS TRENDS

2004 EDITION



World Association of Newspapers

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In 1998 WAN adopted the UNESCO definition of newspapers in order to further standardise and thus facilitate international comparisons. According to the definition which is used in this survey, daily newspapers are those published at least four times a week, non-daily newspapers are those published three times a week or less, and Sunday newspapers are those published only on Sundays.

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PUBLISHED AS PART OF THE SFN PROJECT, SUPPORTED BY:



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Preface by World Association of Newspapers

The World Association of Newspapers has been publishing data on the world's press since 1986. The 2004 edition of *World Press Trends* represents a major leap forward in the number of countries surveyed, which have increased from 74 last year to 208. In fact, the new survey now contains data on all countries in the world where newspapers are published.

There is no doubt that newspapers, as other traditional media, are under pressure as the number of media channels expand and consumers refuse to give more of their time to media consumption.

Inevitably, the share of advertising revenues and consumption is falling in some countries but this is true for all media, and especially TV, which in many key markets is struggling with the twin problems of falling audiences and audience fragmentation.

Newspapers continue despite intensifying competition to endure and prosper, and in a digital age will continue to exploit unique in-built advantages.

Newspapers are the ultimate portable media. Compared to electronic and digital media, newspapers are more convenient, they are easily disposable or they can be kept indefinitely, they are cheap to buy and give away and they are rich in content.

Between 1999 and 2003 global newspaper circulations have increased by no less than 5%. This has been due to excellent growth rates in developing markets all over the

world. Circulation in India, for example, increased by 1% last year and by 23% in five years; in China circulations increased by more than 20% in four years.

For advertisers, newspapers deliver key and unique advantages, enabling them to communicate quickly and efficiently and if necessary in great detail with mass markets, as well as tightly defined target audiences. Global newspaper advertising revenues increased in 2003 by 1.9%. The ZenithOptimedia forecast for 2004 predicts continued and even accelerated growth (3.2%).

We have seen resurgence in the growth of internet advertising, which many outside the newspaper industry perceive as a threat to newspapers. In fact, the opposite is true. With access to the enormous range of content generated by newsrooms and advertising departments, newspapers have been at the forefront of the ongoing digital revolution. For the 50 countries where we have data, we record the existence of 3,489 newspaper websites, an increase of 13% on the previous year. With their associated revenues, and opportunities to cross-promote with the newspaper, these websites represent a powerful presence in the on-line market and a continued opportunity for publishers.

Globally, the future for newspapers will be one of continued change and adaptation to the new consumer reality of increased media choice and less time to consume. This is a reality in which newspapers will continue to deliver rich editorial and advertising content to a mass audience of newspaper readers in every corner of the globe.

ERRATUM

World Press Trends 2004

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DAILIES: CIRCULATION

The distribution numbers for free newspapers have been included by error in the calculation of total circulations, together with the % sales growth or decline, in some of the countries in the table. Please refer to the detailed tables in the individual country chapters to separate paid-for and free circulation/distribution. Note that the circulation graphics in these chapters may also have bundled together these two types of publication.

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DAILIES: ADVERTISING REVENUES

Country	1999	2000	2001	2002	2003	US\$ million 2003	Change (%) current prices	
							2003/99	2003/02
Ireland (€ million) *	230	274	-	254	561**	528	-	-
Lithuania (US\$ million)	32	24	26	36	32	32	0.0	-11.1

* including Sundays in 1999-2001

** including Irish editions of UK dailies

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FRANCE

Number of titles and circulation

	1999	2000	2001	2002	2003	Change (%)	
						2003/99	2003/02
Circulation (000)							
Total dailies	8,447	8,424	8,429	8,149	8,026	-4.98	-1.51
National dailies	2,341	2,352	2,355	2,241	2,189	-6.49	-2.32
Regional dailies	6,106	6,072	6,074	5,908	5,837	-4.41	-1.20

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IRELAND

More facts

	1999	2000	2001	2002	2003**
Advertising revenues (Euro million)					
Dailies *	230	274	-	254	561
Dailies \$ *	253	285	-	263	542
Non-dailies	68	-	-	-	26
Sundays	-	-	-	-	142

* 1999-2001 including Sundays

** Including Irish editions of UK dailies and Sundays

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TURKEY

Top ten dailies (2003)

Title	Readership (000)
Hurriyet	1,736
Posta	1,763
Sabah	2,043
Zaman	888
Milliyet	1,177
Fanatik	1,050
Vatan	491
Tercüman	-
Gözcü	307
Türkiye	440

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PORTUGAL

Number of titles and circulation

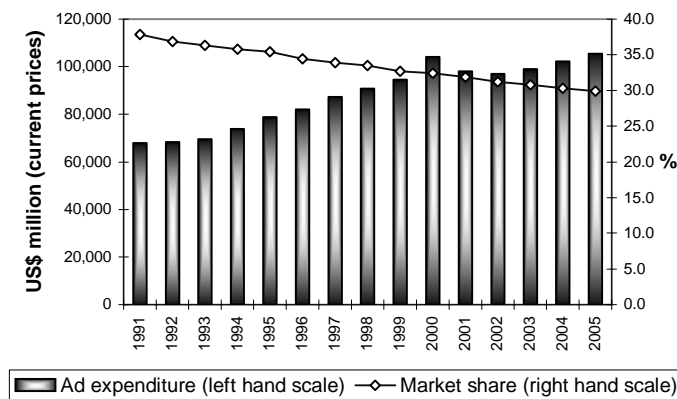
	1999	2000	2001	2002	2003	Change (%)	
						2003/99	2003/02
Circulation (000)							
Free papers	582	835	1,104	789	2,574	+342.3	+226.2

CHAPTER ONE



OVERALL STATISTICS

Newspaper ad expenditure and newspapers' share of the ad market



ZenithOptimedia collects data on advertising expenditure in 57 countries around the world every six months. We estimate that total advertising expenditure grew by 3.3% in 2003, as the global economy started to recover and advertiser confidence returned. Both Iraq and SARS added uncertainty at the beginning of 2003, but the only countries to show sharp downturns in the first quarter of the year were those most directly affected by these threats: Hong Kong, Singapore, Taiwan, Saudi Arabia and the pan-Arab region. Following two years of decline, we estimate that the world's newspaper ad market grew by 1.9% in 2003 to almost US\$99 billion. As the global ad market picks up, we expect further growth in newspaper ad expenditure over the next few years.

Over the long term, the amount spent on newspaper advertising has grown quite substantially, if somewhat erratically. Newspapers' market share, however, has been in a long decline; newspapers have been losing share to other media for many years, and 1987 was the last year that the sector added any share. In 2003, newspapers' share of the world ad market was 30.8%, down from 31.2%

in 2002. The quadrennial events in 2004 (US presidential election, summer Olympics and the European football championships) will move funds into television from other media and we expect newspapers' market share to continue to decline in 2004.

Newspapers are still the world's second largest advertising medium, after television, which took 38.8% of world advertising expenditure in 2003. Large advertisers and categories supplying most of the demand in today's market are maintaining or increasing their use of television, but newspapers have some important advantages in today's short-term price-competitive market – advertising in newspapers is much quicker to arrange than TV, for example, and ads are much cheaper to make. Newspaper ads also supply a lot more information than can be squeezed into television or radio ads, and they have the added benefit of being able to grab the reader's attention with striking images. Newspapers still have much to offer advertisers, and while people continue to read newspapers, advertisers will want to use the medium to reach them.



ADVERTISING REVENUE SHARES

	1999 (%)							2003 (%)							2006 (%)	Source for 1999 shares:
	News papers	Magazines	TV	Radio	Cinema	Outdoor	Internet	News papers	Magazines	TV	Radio	Cinema	Outdoor	Internet		
Argentina	33.8	9.5	42.4	6.3	1.7	6.3	-	39.7	5.0	41.9	4.4	1.7	6.5	0.7	39.7	Argentine Advertising Agencies Association
Australia	41.7	10.8	33.3	8.7	0.8	4.2	0.5	39.3	10.4	36.0	9.3	0.8	3.4	0.8	38.4	Commercial Economic Advisory Service of Australia
Austria	31.5	27.7	24.6	8.8	0.5	6.9	-	28.9	30.6	24.6	7.8	0.6	7.5	-	27.8	Nielsen, Focus Media Research
Bahrain	42.7	5.6	50.9	0.7	0.0	-	-	-	-	-	-	-	-	-	-	PARC
Belgium	23.5	14.8	41.2	9.2	1.5	9.5	0.3	21.5	12.5	44.7	10.3	1.1	9.3	0.6	20.6	ACP, MediaMark
Bosnia & Herzegovina*	-	-	-	-	-	-	-	6.0	-	65.0	4.0	-	25.0	-	-	European Journalism Centre's Media Landscape
Brazil	22.8	9.9	56.6	5.0	-	5.0	0.8	17.6	9.4	57.9	6.3	-	4.9	3.9	17.7	Inter-Meios project
Bulgaria	30.3	7.9	61.8	-	-	-	-	16.8	8.8	62.8	-	-	11.6	-	14.9	BBSS Gallup
Cambodia	9.9	-	60.3	-	-	29.9	-	5.5	-	85.2	-	-	9.3	-	-	JRL
Canada	43.7	6.3	32.4	13.1	0.1	3.7	0.8	40.4	7.2	32.6	13.8	0.2	4.2	1.7	39.1	Statistics Canada, TVB, RMB, Magazines Canada
Chile	36.0	3.6	43.7	9.8	0.4	6.5	-	34.0	4.0	44.8	10.2	0.4	6.6	-	33.3	ACHAP
China	32.6	2.6	45.4	3.6	-	15.8	-	36.5	2.8	44.7	3.9	-	12.1	-	35.5	State Admin. of Industry and Commerce
Colombia	19.8	6.1	57.8	16.2	-	-	-	22.8	6.1	60.8	10.3	-	-	-	22.8	ACHAP, Ibope, ZenithOptimedia
Costa Rica	35.6	3.8	45.6	14.9	-	-	-	-	-	-	-	-	-	-	-	Servicios Publicitarios Computerizados
Croatia	-	-	-	-	-	-	-	13.7	13.2	59.8	6.1	-	7.2	-	-	Media Net
Cyprus	9.4	8.3	82.3	-	-	-	-	-	-	-	-	-	-	-	-	MEMRB/AMER Research/Megasoft/ZenithOptimedia
Czech Rep.	20.2	21.1	49.6	4.7	-	4.0	0.2	19.5	19.9	47.6	6.0	0.3	5.8	1.0	18.6	Amer Nielsen/A-Connect
Denmark	51.9	3.9	17.1	1.8	0.5	24.9	-	41.9	3.2	17.1	2.3	0.6	30.5	4.5	39.6	Dansk Oplagskontrol
Estonia	47.8	12.7	20.4	12.0	-	6.5	0.7	45.4	12.2	26.0	8.7	-	3.0	4.7	44.6	ZenithOptimedia
Finland	56.4	16.5	19.9	3.3	0.2	3.1	0.6	55.1	16.6	19.4	4.4	0.2	2.9	1.4	54.6	Gallup Mainostieto
France	17.6	33.1	29.0	7.0	0.7	11.8	0.9	15.7	32.2	31.5	7.8	0.7	11.1	1.0	15.0	IREP
Germany	44.0	23.9	23.3	3.7	0.9	3.7	0.4	43.5	22.1	24.2	3.4	0.9	4.4	1.5	42.4	ZAW
Greece	17.2	25.6	41.2	4.6	0.5	10.9	-	14.1	31.9	33.6	4.6	0.7	15.0	0.1	15.7	Media Services
Honduras	36.1	0.1	59.6	4.2	-	-	-	-	-	-	-	-	-	-	-	SPC, ZenithOptimedia
Hong Kong	35.8	11.5	46.1	3.8	0.1	2.7	-	40.6	10.7	33.8	7.0	0.1	7.0	0.8	39.2	HK Adex SRG
Hungary	16.9	15.2	54.9	5.9	0.5	6.5	-	12.0	11.8	65.5	4.3	0.4	6.0	-	12.0	Mediagnosis
Iceland	61.0	8.5	28.7	-	0.9	1.0	-	61.2	7.2	29.0	-	-	2.6	-	-	Statistics Iceland
India	49.5	-	39.5	2.4	0.4	8.1	0.1	38.7	7.9	43.0	2.9	0.7	6.5	0.4	37.0	ORG-MARG, AIR, ZenithOptimedia
Indonesia	25.2	5.2	61.4	3.3	0.1	4.8	0.0	25.8	5.9	63.6	3.0	0.1	1.6	0.0	26.1	Nielsen, IAA
Ireland	48.2	3.5	30.4	8.6	0.9	8.5	-	60.2	2.7	19.0	7.0	0.9	9.6	0.7	59.8	Advertising Statistics of Ireland
Israel	56.9	4.0	24.6	7.4	0.3	6.7	-	49.8	6.5	29.3	7.3	0.4	5.5	1.1	48.7	Advertising Association of Israel
Italy	22.5	14.6	52.4	5.4	0.6	4.0	0.4	20.1	14.2	54.0	5.7	0.8	3.8	1.3	19.4	Media Key
Japan	27.1	9.8	44.9	4.8	-	12.8	0.6	25.0	9.5	46.5	4.3	-	12.4	2.2	24.6	Dentsu
Kenya	42.0	5.1	26.3	26.0	0.7	-	-	-	-	-	-	-	-	-	-	ZenithOptimedia
Korea, Republic Of	53.1	4.0	28.0	2.7	-	10.7	1.5	41.2	4.3	37.0	3.9	-	11.3	2.4	38.5	Korea Advertising Data, DBK
Kuwait *	65.5	20.8	6.4	1.7	-	-	-	69.9	14.0	2.9	1.1	-	-	-	-	PARC
Laos	31.9	-	41.8	8.5	0.9	-	-	19.3	15.7	42.6	9.8	1.0	-	-	-	Ariya
Latvia	39.5	7.5	31.7	15.7	-	5.7	-	33.7	12.0	35.2	11.5	0.7	5.5	1.4	31.6	BMF Gallup Media
Lebanon	12.3	4.7	75.6	4.5	-	2.9	-	21.0	8.0	42.0	9.0	-	20.0	-	-	STAT, SMM
Lithuania	39.8	6.4	41.3	6.4	0.1	5.9	0.0	28.8	11.9	44.1	7.1	0.1	7.2	0.8	27.5	Media House
Luxembourg	65.2	5.3	10.4	15.0	1.8	2.2	-	-	-	-	-	-	-	-	-	Publinvest
Malaysia	57.6	4.1	32.2	3.3	0.4	2.3	-	62.8	4.5	25.9	4.4	0.3	2.0	-	64.2	AC Nielsen
Mexico	17.8	12.5	54.0	15.8	-	-	-	13.6	8.1	55.7	22.6	-	-	-	12.0	IBOPE/ZenithOptimedia
Myanmar	14.7	4.6	69.7	-	0.8	10.1	-	22.0	32.9	36.2	0.1	1.1	7.7	-	-	MMRD
Netherlands	47.0	24.5	18.9	5.4	0.3	3.4	0.6	40.8	23.7	23.1	7.9	0.2	3.6	0.9	41.7	Meten & Weten
New Zealand	39.9	11.2	34.3	12.5	0.8	1.3	-	39.3	10.9	33.9	12.9	0.5	2.5	-	38.4	AAA, Media owners
Nigeria	6.5	6.5	47.0	20.0	-	15.0	-	-	-	-	-	-	-	-	-	MMIS, APCON, Mediafacts
Norway	45.6	11.9	32.0	5.7	1.1	2.2	1.4	43.3	11.9	34.7	3.5	0.8	3.6	2.4	42.8	AC Nielsen
Oman	76.5	1.7	21.8	-	-	-	-	-	-	-	-	-	-	-	-	PARC
Pakistan	22.9	6.2	59.9	2.0	0.5	8.5	0.0	32.1	8.5	48.9	2.8	0.5	7.2	0.0	28.5	Gallup AdTrack
Panama	34.4	-	60.8	4.7	-	-	-	33.0	-	62.0	5.0	-	-	-	28.5	Controles de Inversión Publicitaria
Peru	32.2	2.6	43.8	10.7	-	10.7	-	29.5	2.3	44.9	12.0	-	11.5	-	-	Media Check/SME
Philippines	15.1	-	62.6	16.7	-	5.6	-	14.7	-	64.7	15.3	-	5.4	-	14.5	Adboard
Poland	10.8	16.0	58.2	7.1	0.2	7.7	-	10.6	14.2	61.6	7.4	0.5	5.4	0.3	11.5	Amer Nielsen
Portugal	10.5	19.5	52.3	6.7	0.6	9.9	0.5	8.2	17.1	54.7	6.4	0.8	12.4	0.5	7.8	Sabatina/ZenithOptimedia
Puerto Rico	32.0	2.4	57.3	7.4	0.3	0.6	0.0	27.3	2.7	62.6	6.6	0.2	0.6	0.0	24.9	AdTrac
Qatar *	93.3	-	6.7	-	-	-	-	88.5	1.6	9.9	-	-	-	-	-	PARC
Romania	12.8	8.0	63.9	3.2	0.2	12.0	-	14.4	9.1	65.3	4.2	0.5	6.5	-	12.8	CSOP, AC Nielsen, AGB Data Research
Russia	33.2	12.2	33.2	5.2	-	16.1	0.1	16.4	12.4	47.4	4.0	0.4	19.0	0.5	12.8	Russian Association of Advertising Agencies
Saudi Arabia/Pan-Arab	27.8	11.5	56.3	1.3	-	3.1	-	24.0	11.2	61.3	1.3	-	2.1	-	23.0	PARC
Serbia-Montenegro	3.0	4.0	75.0	6.0	-	12.0	-	18.5	-	66.2	3.8	-	11.5	-	-	SMMRI
Singapore	50.1	5.1	33.7	5.1	1.4	4.5	-	38.3	4.6	42.9	8.9	0.5	4.8	-	35.5	AC Nielsen, SRS Adex
Slovakia	12.6	9.5	68.0	5.9	-	4.0	-	7.9	9.6	66.5	6.8	3.0	6.1	-	-	A-Connect
Slovenia	12.1	17.0	55.5	10.5	-	4.9	-	-	-	-	-	-	-	-	-	Mediana, IBO Advertising Expenditure
South Africa	27.9	15.0	41.5	11.6	0.8	3.1	-	27.9	12.0	42.6	12.6	0.7	3.9	0.4	26.8	Adindex/Nielsen
Spain	29.9	13.2	41.1	9.1	0.8	5.5	0.3	26.9	12.7	41.9	9.1	0.9	7.6	1.0	25.6	Duplo, Nielsen, Infoadex
Sri Lanka *	-	-	-	-	-	-	-	25.0	-	40.0	25.0	-	10.0	-	-	ZenithOptimedia
Sweden	54.0	13.9	21.2	3.3	0.4	4.2	3.1	48.4	14.7	21.7	3.5	0.7	4.7	6.3	47.2	University of Gothenburg, Annonsoforeningen, IRM
Switzerland	53.0	17.9	12.2	3.0	1.1	12.6	0.3	47.6	17.3	14.7	3.3	1.0	14.3	1.8	45.6	Stiftung Werbestatistik Schweiz
Taiwan	31.8	10.3	54.3	3.6	-	-	-	21.1	12.2	59.9	5.2	-	1.6	-	20.2	Rainmaker Research
Tanzania	5.1	0.0	55.4	35.2	-	4.3	-	-	-	-	-	-	-	-	-	ZenithOptimedia
Thailand	29.7	4.2	54.6	8.6	0.5	2.2	0.2	25.2	5.6	54.4	8.5	1.1	4.9	0.2	23.3	Media Focus
Turkey	35.5	6.3	42.1	6.5	1.4	8.1	-	34.6	1.9	50.7	4.8	0.7	7.1	0.2	36.1	Advertising Agencies Association
Ukraine	13.9	6.2	58.1	6.5	-	15.2	-	4.8	4.6	80.3	2.4	-	7.9	-	-	MMI Ukraine, Consulting Ukraine
United Arab Emirates	53.8	16.9	18.0	6.0	-	5.3	-	63.0	15.7	9.0	5.2	-	7.0	-	-	PARC
United Kingdom	39.5	17.1	32.5	4.1	1.1	5.3	0.4	39.7	15.1	30.8	4.3	1.4	6.2	2.5	37.4	Advertising Association
United States of America	32.5	11.6	35.2	13.8	-	3.4	3.4	31.4	11.2	35.1	13.3	0.2	3.5	5.3	30.4	NAA, IOA, TVE, CMR, CAB, RAB, Paul Kagan Assoc.
Uruguay	23.4	-	51.5	14.6	-	9.4	1.2	14.0	-	51.2	12.6	1.9	18.6	1.9	12.6	Asociación Uruguaya de Agencias de Publicidad
Venezuela	22.2	1.6	68.1	2.3	2.7	3.2	-	19.8	2.1	67.0	4.6	2.8	3.6	-	22.6	JVP
Vietnam	31.9	-	48.3	3.4	-	16.4	-	29.9	-	55.9	1.2	-	13.0	-	31.6	SRG Vietnam, ZenithOptimedia
Zimbabwe	56.0	7.7	15.8	17.3	0.6	2.6	-	-	-	-	-	-	-	-	-	Ad data

* Newspapers' includes 'Magazines' in Bosnia & Herzegovina India (in 1999), the Philippines and Sri Lanka.
 * Outdoor' includes other media in Cameroon, China, Denmark, Iceland, Luxembourg, Serbia-Montenegro and Sri Lanka.
 * 2003' figures actually refer to 2002



ADVERTISING AND SALES REVENUES OF DAILY NEWSPAPERS

percentage contribution to total revenues

Country	Year	Contribution to revenue				Year
		Advertising	Sales	Advertising	Sales	
Armenia	-	-	-	5	95	2002
Australia	1999	68	32	67	33	2000
Belgium	1999	56	44	56	44	2002
Canada	1999	78	22	79	21	2003
Colombia	-	-	-	98	2	1999
Croatia	2001	22	78	27	73	2003
Czech Republic	1999	52	48	63	37	2003
Denmark	2000	41	59	42	58	2002
East Timor	-	-	-	20	80	2002
Estonia	1999	46	54	51	49	2003
Finland	1999	55	45	54	46	2001
France	1999	32	68	31	69	2001
Germany	1999	63	37	57	43	2002
Greece	1999	53	47	50	50	2003
Iceland	1999	61	39	61	39	2002
Ireland	-	-	-	68	32	2003
Italy	1999	55	45	54	46	2003
Japan	1999	40	60	38	62	2002
Latvia	1999	44	56	41	59	2003
Lebanon	1999	31	69	28	72	2003
Luxembourg	1999	78	22	79	21	2003
Macedonia	-	-	-	43	57	2002
Netherlands, The	1999	44	56	42	58	2003
Norway	1999	63	37	50	50	2003
Portugal	-	-	-	61	39	2002
Slovakia	2002	42	58	48	52	2003
Spain	1999	60	40	49	51	2003
Sri Lanka	2000	70	30	70	30	2001
Sweden	1999	57	43	53	47	2003
Turkey	1999	49	51	65	35	2003
United Kingdom	1999	62	38	62	38	2002
United States of America	1999	88	12	87	13	2002
Uruguay	2000	69	31	57	43	2003

TITLES AND CIRCULATIONS

	1999	2000	2001	2002	2003	Change (%)	
						99/2003	2002/03
No. daily titles							
USA	1,483	1,480	1,468	1,457	1,456	-1.82	-0.07
Japan	109	110	106	106	105	-3.67	-0.94
EU †	1,311	1,372	1,361	1,356	1,350	2.97	-0.44
<i>Established EU members</i>	1,139	1,132	1,132	1,124	1,138	-0.09	1.25
<i>New EU members</i>	172	240	229	232	212	23.26	-8.62
Other countries *	3,495	3,551	3,513	3,633	3,738	6.95	2.89
Total	6,398	6,513	6,448	6,552	6,649	3.92	1.48
Circulation of daily titles (000)							
USA	55,979	55,773	55,578	55,186	55,185	-1.42	0.00
Japan	72,218	71,896	71,694	70,815	70,339	-2.60	-0.67
EU †	88,755	88,281	90,085	89,116	88,630	-0.14	-0.55
<i>Established EU members</i>	80,278	80,620	81,199	80,433	79,983	-0.37	-0.56
<i>New EU members</i>	8,477	7,661	8,886	8,683	8,647	2.01	-0.41
Other countries *	157,262	168,056	173,239	177,337	177,840	13.09	0.28
Total	374,214	384,006	390,597	392,454	391,994	4.75	-0.12
Average circulation per title (000)							
USA	37.7	37.7	37.9	37.9	37.9	0.41	0.07
Japan	662.6	653.6	676.4	668.1	669.9	1.11	0.27
EU †	67.7	64.3	66.2	65.7	65.7	-3.03	-0.10
<i>Established EU members</i>	70.5	71.2	71.7	71.6	70.3	-0.28	-1.78
<i>New EU members</i>	49.3	31.9	38.8	37.4	40.8	-17.24	8.98
Other countries *	45.0	47.3	49.3	48.8	47.6	5.73	-2.53
Total	58.5	59.0	60.6	59.9	59.0	0.80	-1.57

† 23 countries in total: 15 established members and 8 new members (Lithuania and Malta are excluded).

* 52 countries. In World Press Trends 2003 there were 45 countries in this category, including the 8 new members of the EU that are now listed separately.

The above table displays the number of daily titles, and their circulation, in four blocs – the USA, Japan, the EU and ‘Other countries’. This last category includes all the other countries in this book for which we have sufficient information. Note that we have estimated some figures for countries that do not have a complete set of data for all five years. The figures for the EU include the new countries that acceded to the EU in May 2004 (we also provide separate figures for the new and established members).

Newspaper circulation figures are falling gradually across the developed world, as they have been for many years. Other media – such as television and the internet – are attracting more attention from consumers, particularly the young. The decline in circulation is not dramatic: in the five years from 1999 to 2003 total circulation fell by 2.6% in Japan, 1.4% in the US and just 0.1% in the EU. The EU figures are improved by the inclusion of the new members; circulation in these eight countries increased by 2% between 1999 and 2003. These countries now contribute 15% of the EU’s adult population but only 10% of its circulation, which suggests they still have some untapped potential for circulation growth.

In the rest of the world circulation figures have risen over the last five years, though they stumbled slightly in 2003. This is partly because populations are expanding quickly in many developing countries and partly because more people can read newspapers and can afford to buy them. Improved communication and distribution networks also allow newspapers to deliver timely news to more and more remote areas. The growth of newspaper circulation in the developing world has more than offset the decline in developed markets: between 1999 and 2003 the total circulation in the countries we cover increased by 5%.

The average circulation of daily newspapers in each region has been more stable than the total circulation. This is simply because publishers tend to launch new titles in markets where circulation figures are rising, and close or consolidate titles in declining markets. The average circulation of a newspaper varies greatly across the world: in 2003 it was 669,900 in Japan, 65,700 in the EU, 37,900 in the USA, and 23,600 in the rest of the world. This seems to be simply a matter of taste: in some countries, readers like to get their news from large national titles, while in others readers prefer small newspapers with local identities.



NUMBER OF DAILY NEWSPAPER WEBSITES

	1999	2000	2001	2002	2003
Argentina	49	100	-	-	-
Armenia	-	-	-	5	-
Australia	22	22	-	-	22
Austria	15	15	14	14	14
Azerbaijan	2	-	14	-	26
Belgium	-	-	17	17	17
Brazil	192	116	308	-	126
Bulgaria	21	27	11	11	14
Chile	-	34	36	-	38
Colombia	19	-	-	-	-
Costa Rica	3	4	5	5	6
Croatia	6	8	12	11	11
Cyprus	-	2	-	-	-
Czech Republic	9	10	9	8	8
Denmark	26	34	29	29	32
East Timor	-	-	2	2	-
Estonia	7	8	10	11	10
Finland	42	47	47	49	49
France	-	30	39	40	41
Germany	179	249	256	259	264
Greece	12	13	13	15	-
Iceland	3	3	3	3	3
Indonesia	-	-	24	24	28
Ireland	3	3	-	3	3
Italy	62	88	89	91	91
Japan	71	79	89	-	-
Korea, Republic Of	52	53	68	-	-
Kyrgyzstan	1	-	-	-	-
Latvia	4	8	13	14	14
Lebanon	6	6	6	6	6
Luxembourg	4	-	3	5	3
Macedonia	-	-	-	-	6
Malaysia	-	-	10	14	-
Mexico	-	-	340	-	-
Moldova	-	-	-	3	-
Mongolia	3	3	5	5	1
Netherlands, The	30	35	35	35	32
Norway	51	73	72	81	78
Poland	-	-	56	41	45
Portugal	12	-	-	12	-
Russia	-	-	-	913	1,329
Singapore	-	-	6	6	-
Slovenia	3	-	3	-	-
Spain	29	85	100	100	100+
Sri Lanka	-	7	-	-	-
Sweden	66	67	79	77	71
Turkey	16	16	22	24	27
United Kingdom	97	-	123	-	100
United States of America	1,149	1,207	-	1,296	1,343
Uruguay	-	3	3	3	3



DAILIES: COUNTRIES OF TOP 100 DAILIES

Ranking	Country	No. top 100 dailies
1	Japan	20
2	China	19
3	United States of America	18
4	India	17
5	United Kingdom	7
6	Germany	3
7	Korea, Republic Of	3
8	Thailand	3
9	Italy	2
10	Austria	1
11	Egypt	1
12	France	1
13	Hong Kong	1
14	Netherlands, The	1
15	Pakistan	1
16	Poland	1
17	Russia	1

DAILIES: TOP 100

Circulation (000)			Circulation (000)				
Title	Country	Circulation (000)	Title	Country	Circulation (000)		
1	Yomiuri Shimbun	Japan	14,081	51	Eenadu	India	920
2	The Asahi Shimbun	Japan	12,235	52	Daily Express	United Kingdom	911
3	Nihon Keizai Shimbun	Japan	4,643	53	Ananda Bazar Patrika	India	911
4	Chunichi Shimbun	Japan	4,542	54	The Daily Telegraph	United Kingdom	895
5	Bild	Germany	3,989	55	Daily Star	United Kingdom	890
6	Mainichi Shimbun	Japan	3,957	56	Mathrubhumi	India	856
7	The Sun	United Kingdom	3,298	57	AJ	India	854
8	Sankei Shimbun	Japan	2,723	58	Punjab Kesari	India	846
9	Cankao Xiaoxi (Beijing)	China	2,670	59	Kyoto Shimbun	Japan	823
10	USA Today	United States of America	2,617	60	Kobe Shimbun	Japan	821
11	Tokyo Sports	Japan	2,425	61	New York Daily News	United States of America	805
12	The Chosun Ilbo	Korea, Republic Of	2,372	62	Kom Chat Leuk	Thailand	800
13	The Daily Mail	United Kingdom	2,316	63	Chugoku Shimbun	Japan	799
14	The Wall Street Journal	United States of America	2,091	64	Dahe Newspaper (Zhengzhou)	China	797
15	Joongang Ilbo	Korea, Republic Of	2,084	65	The Dallas Morning News	United States of America	786
16	The Donga Ilbo	Korea, Republic Of	2,062	66	Denver Post / Rocky Mountain News	United States of America	786
17	Nikkan Sports	Japan	1,975	67	Ouest France	France	783
18	Hokkaido Shimbun	Japan	1,935	68	De Telegraaf	Netherlands, The	776
19	People's Daily (Beijing)	China	1,728	69	Jang	Pakistan	775
20	Sports Nippon	Japan	1,725	70	Hindustan	India	753
21	Yangtse Evening News (Nanjing)	China	1,707	71	Philadelphia Inquirer	United States of America	750
22	New York Times	United States of America	1,677	72	Daily News	Thailand	750
23	Dainik Bhaskar	India	1,600	73	Nanfeng Daily (Guangzhou)	China	750
24	Guangzhou Daily	China	1,600	74	Houston Chronicle	United States of America	747
25	Yukan Fuji	Japan	1,559	75	Sandesh	India	743
26	Daily Mirror	United Kingdom	1,549	76	The Detroit News / Free Press	United States of America	721
27	Shizuoka Shimbun	Japan	1,478	77	Qianjiang Evening News (Hangzhou)	China	720
28	Dainik Jagran	India	1,456	78	Fakt	Poland	715
29	Los Angeles Times	United States of America	1,379	79	Komsomolskaya Pravda	Russia	712
30	Hochi Shimbun	Japan	1,373	80	Boston Globe	United States of America	706
31	Sankei Sports	Japan	1,368	81	Daily Thanthi	India	687
32	Yangcheng Evening News (Guangzhou)	China	1,300	82	Corriere della Sera	Italy	679
33	The Times of India	India	1,284	83	Long Island Newsday	United States of America	678
34	Malayala Manorama	India	1,220	84	Minneapolis Star Tribune	United States of America	678
35	Thai Rath	Thailand	1,200	85	Rajasthan Patrika	India	673
36	Nanfeng City News (Guangzhou)	China	1,170	86	Beijing Youth Daily	China	666
37	Qilu Evening News (Jinan)	China	1,150	87	Wuhan Evening News	China	660
38	Hindustan Times	India	1,108	88	New York Post	United States of America	652
39	Xinmin Evening News (Shanghai)	China	1,108	89	Today Evening News (Tianjin)	China	650
40	Chutian Metro Daily (Wuhan)	China	1,075	90	Zeitungsgruppe Köln Gesamt	Germany	644
41	Gujarat Samachar	India	1,051	91	The Times	United Kingdom	635
42	The Washington Post	United States of America	1,030	92	Kahoku Shimpo	Japan	624
43	Nishi-Nippon Shimbun	Japan	1,030	93	Atlanta Journal Constitution	United States of America	622
44	WAZ Mediengruppe	Germany	1,029	94	Repubblica	Italy	622
45	Kronen Zeitung	Austria	1,007	95	The Newark Star-Ledger	United States of America	611
46	Chicago Tribune	United States of America	1,002	96	Apple Daily	Hong Kong	600
47	Al-Ahram (Pyramids)	Egypt	1,000	97	Meiri Xinbao (Morning Post)	China	600
48	Daily Sports	Japan	984	98	Western China City Daily (Chengdu)	China	600
49	Beijing Evening News	China	950	99	New Express (Guangzhou)	China	600
50	The Hindu	India	933	100	Daily Sakal	India	590



DAILIES: NUMBER OF TITLES

Country	1999	2000	2001	2002	2003	Change (%)		no. of titles/adult population (million)	
						1999/2003	2002/2003	1999 ^a	2003 ^b
Albania	-	-	16	18	-	-	-	6.2	7.0
Andorra	2	2	2	2	2	0.0	0.0	34.5	34.5
Argentina	102	106	-	-	-	-	-	3.8	4.0
Armenia	-	-	5	12	-	-	-	1.8	4.4
Australia	48	48	48	48	47	-2.1	-2.1	3.2	3.2
Austria	17	16	15	15	16	-5.9	6.7	2.5	2.4
Azerbaijan	15	-	22	22	24	60.0	9.1	2.8	4.4
Belarus	-	10	-	-	-	-	-	1.2	1.2
Belgium	28	28	27	28	28	0.0	0.0	3.3	3.3
Bosnia & Herzegovina	-	-	-	8	-	-	-	2.5	2.5
Botswana	-	-	-	1	-	-	-	1.1	1.1
Brazil	465	465	491	523	529	13.8	1.1	3.8	4.3
Brunei	-	-	-	2	-	-	-	7.9	7.9
Bulgaria	36	43	49	48	63	75.0	31.3	5.6	9.8
Burkina Faso	-	-	-	5	-	-	-	0.7	0.7
Canada	106	104	104	102	102	-3.8	0.0	7.3	7.0
Cayman Islands	-	-	-	1	-	-	-	30.3	30.3
Chile	51	53	51	47	54	5.9	14.9	4.5	4.8
China	805	909	975	1,007	-	-	-	0.9	1.1
Colombia	24	-	-	-	-	-	-	0.8	0.8
Comoros	-	-	-	2	-	-	-	5.5	5.5
Congo, Democratic Rep	-	-	9	11	-	-	-	0.3	0.4
Cook Islands	-	-	-	1	-	-	-	47.6	47.6
Costa Rica	6	6	6	6	7	16.7	16.7	2.4	2.8
Croatia	11	12	12	12	11	0.0	-8.3	3.0	3.0
Cuba	2	2	-	18	-	-	-	0.2	2.0
Cyprus	8	8	-	-	-	-	-	16.3	16.3
Czech Republic	18	75	67	73	65	261.1	-11.0	2.1	7.5
Denmark	34	31	30	30	34	0.0	13.3	7.9	7.9
Dominican Republic	18	9	-	12	-	-	-	3.1	2.1
East Timor	2	1	2	2	2	0.0	0.0	3.9	3.9
Ecuador	36	36	-	-	-	-	-	4.0	4.0
Egypt	16	-	-	-	-	-	-	0.3	0.3
El Salvador	-	-	-	5	-	-	-	1.2	1.2
Estonia	17	13	12	12	11	-35.3	-8.3	13.8	9.0
Fiji	-	-	-	3	-	-	-	5.1	5.1
Finland	56	55	54	54	53	-5.4	-1.9	13.1	12.4
France	87	84	84	84	84	-3.4	0.0	1.8	1.7
Gambia, The	-	-	-	2	-	-	-	2.4	2.4
Georgia	30	35	-	-	-	-	-	7.5	8.7
Germany	387	382	381	374	372	-3.9	-0.5	5.5	5.3
Greece	29	32	32	32	42	44.8	31.3	3.1	4.5
Guinea	-	-	-	1	-	-	-	0.2	0.2
Guyana	-	-	-	2	-	-	-	3.9	3.9
Haiti	-	-	-	2	-	-	-	0.5	0.5
Hong Kong	48	-	-	-	-	-	-	8.5	8.5
Hungary	31	30	34	37	34	9.7	-8.1	3.7	4.1
Iceland	3	3	3	3	3	0.0	0.0	13.6	13.6
India	392	398	393	402	412	5.1	2.5	0.6	0.6
Indonesia	225	396	187	176	202	-10.2	14.8	1.4	1.3
Ireland	6	6	6	6	7	16.7	16.7	1.9	2.3
Italy	88	89	92	99	99	12.5	0.0	1.8	2.0
Jamaica	-	-	-	3	-	-	-	1.6	1.6
Japan	109	110	106	106	105	-3.7	-0.9	1.0	1.0
Jordan	5	5	-	5	-	-	-	1.4	1.4
Kenya	4	-	-	-	-	-	-	0.2	0.2
Korea, Republic of	113	119	123	125	132	16.8	5.6	3.1	3.6
Kyrgyzstan	3	3	-	-	-	-	-	0.9	0.9
Latvia	20	21	23	24	23	15.0	-4.2	10.4	12.0
Lebanon	14	13	13	13	14	0.0	7.7	6.1	6.1
Liechtenstein	-	-	-	2	-	-	-	74.1	74.1

Continued opposite



DAILIES: NUMBER OF TITLES (continued)

Country	1999	2000	2001	2002	2003	Change (%)		no. of titles/adult population (million)	
						1999/2003	2002/2003	1999 [^]	2003 ^o
Luxembourg	5	5	7	6	6	20.0	0.0	13.7	16.5
Macau	10	10	-	12	-	-	-	26.9	32.3
Macedonia	-	-	7	7	10	-	42.9	4.5	6.4
Madagascar	-	-	-	4	-	-	-	0.4	0.4
Malawi	-	-	-	2	-	-	-	0.3	0.3
Malaysia	-	31	34	32	32	-	0.0	2.4	2.5
Maldives	-	-	-	3	-	-	-	16.5	16.5
Malta	-	-	-	4	-	-	-	12.4	12.4
Mauritania	-	-	-	3	-	-	-	1.9	1.9
Mauritius	6	5	-	4	-	-	-	6.6	4.4
Mexico	-	-	342	299	-	-	-	4.3	3.8
Moldova	-	-	-	3	-	-	-	1.1	1.1
Mongolia	5	5	5	5	6	20.0	20.0	3.0	3.6
Morocco	22	23	-	-	132	500.0	-	1.0	6.2
Mozambique	-	-	-	-	2	-	-	-	0.2
Netherlands, The	35	35	35	35	32	-8.6	-8.6	2.7	2.4
New Caledonia	-	-	-	1	-	-	-	6.8	6.8
New Zealand	26	26	26	24	24	-7.7	0.0	8.5	7.8
Niger	-	-	-	-	1	-	-	-	0.2
Norway	83	82	81	81	78	-6.0	-3.7	23.2	21.8
Pakistan	538	306	336	-	-	-	-	6.9	4.3
Papua New Guinea	-	-	-	2	-	-	-	0.6	0.6
Poland	50	59	58	53	50	0.0	-5.7	1.6	1.6
Portugal	28	-	-	28	29	3.6	3.6	3.2	3.3
Romania	-	-	46	-	-	-	-	2.5	2.5
Russia	268	315	222	418	449	67.5	7.4	2.0	3.4
Saint Vincent and the Grenadines	-	-	-	1	-	-	-	11.9	11.9
Samoa	-	-	-	-	1	-	-	-	7.9
San Marino	-	-	-	3	-	-	-	125.0	125.0
Sao Tome and Principe	-	-	-	1	-	-	-	10.9	10.9
Serbia-Montenegro	-	-	-	29	-	-	-	4.7	4.7
Seychelles	-	-	-	1	-	-	-	17.2	17.2
Singapore	8	9	8	8	-	-	-	2.6	2.6
Slovakia	23	29	21	19	15	-34.8	-21.1	5.4	3.5
Slovenia	5	-	6	6	-	-	-	3.1	3.7
Solomon Islands	-	-	-	1	-	-	-	3.4	3.4
South Africa	18	16	17	18	18	0.0	0.0	0.6	0.6
Spain	135	137	136	132	135	0.0	2.3	3.9	3.9
Sri Lanka	-	12	13	13	-	-	-	0.8	0.9
Suriname	-	-	-	1	-	-	-	3.3	3.3
Swaziland	-	-	-	2	-	-	-	2.9	2.9
Sweden	98	96	97	94	94	-4.1	0.0	13.5	13.0
Switzerland	105	104	98	98	97	-7.6	-1.0	17.4	16.0
Taiwan	29	29	27	30	-	-	-	1.6	1.7
Tanzania	-	-	-	7	-	-	-	0.2	0.2
Togo	-	-	-	-	1	-	-	-	0.3
Trinidad & Tobago	-	-	-	4	-	-	-	4.7	4.7
Tunisia	-	7	7	7	-	-	-	1.0	1.0
Turkey	43	45	45	55	63	46.5	14.5	1.7	2.4
Turkmenistan	2	2	-	-	2	0.0	-	0.7	0.7
Uganda	4	3	4	-	-	-	-	0.4	0.4
Ukraine	38	-	-	-	-	-	-	2.4	2.4
United Kingdom	106	108	108	107	107	0.9	0.0	2.2	2.3
United States of America	1,483	1,480	1,468	1,457	1,456	-1.8	-0.1	7.1	6.9
Uruguay	-	4	4	4	4	-	0.0	1.4	1.4
Vanuatu	-	-	-	1	-	-	-	7.7	7.7
Virgin Islands	-	-	-	1	-	-	-	10.9	10.9
Yemen	-	-	-	3	-	-	-	0.3	0.3
Zambia	-	-	-	3	-	-	-	0.5	0.5
TOTAL	6,690	6,741	6,732	6,760	5,421	-19.0	-19.8	1.9	1.5
Number of countries	68	65	59	101	54				

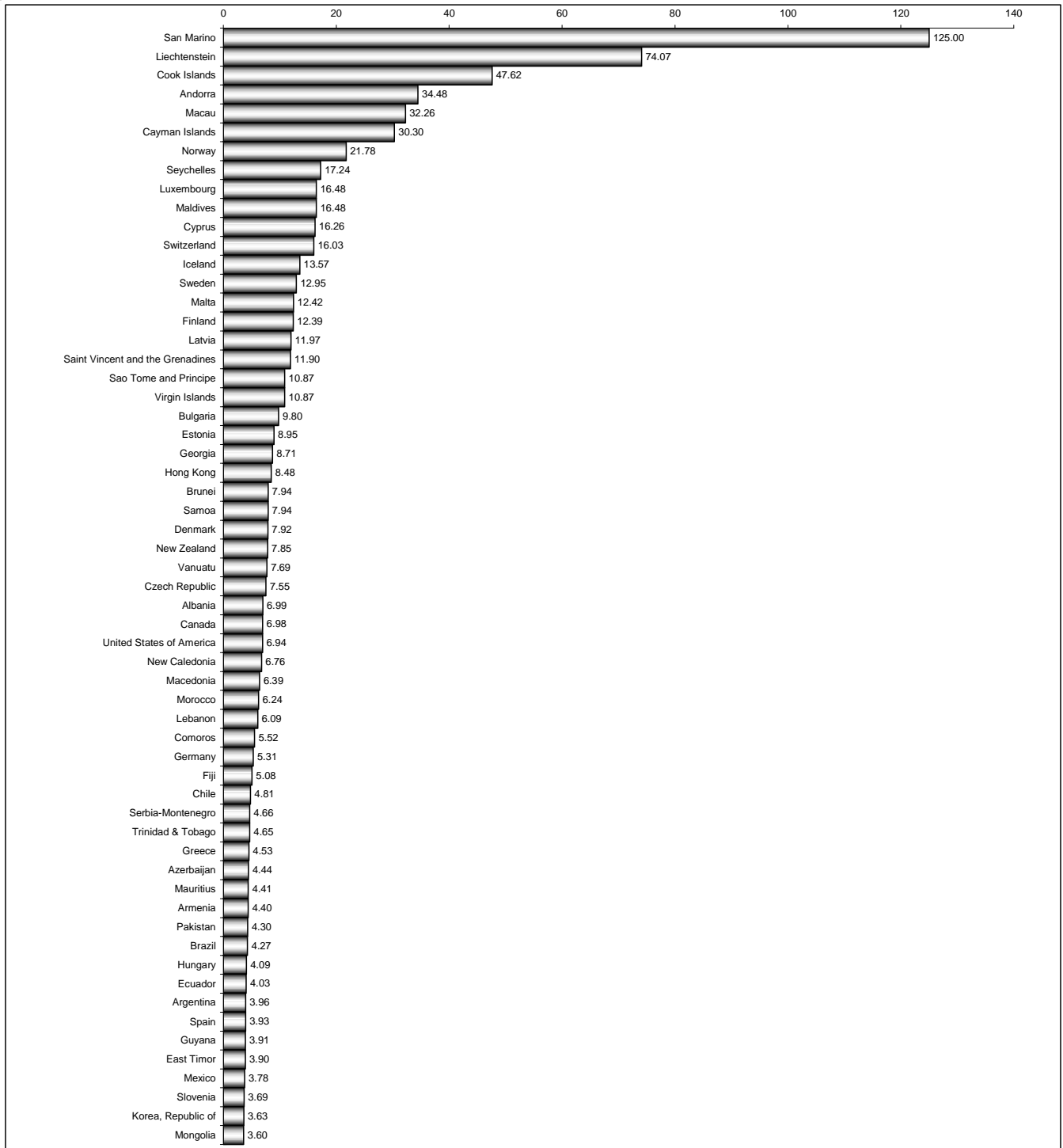
Note: many countries now include free dailies in their dailies total. Please see country entries for details.

[^] or earliest available figures

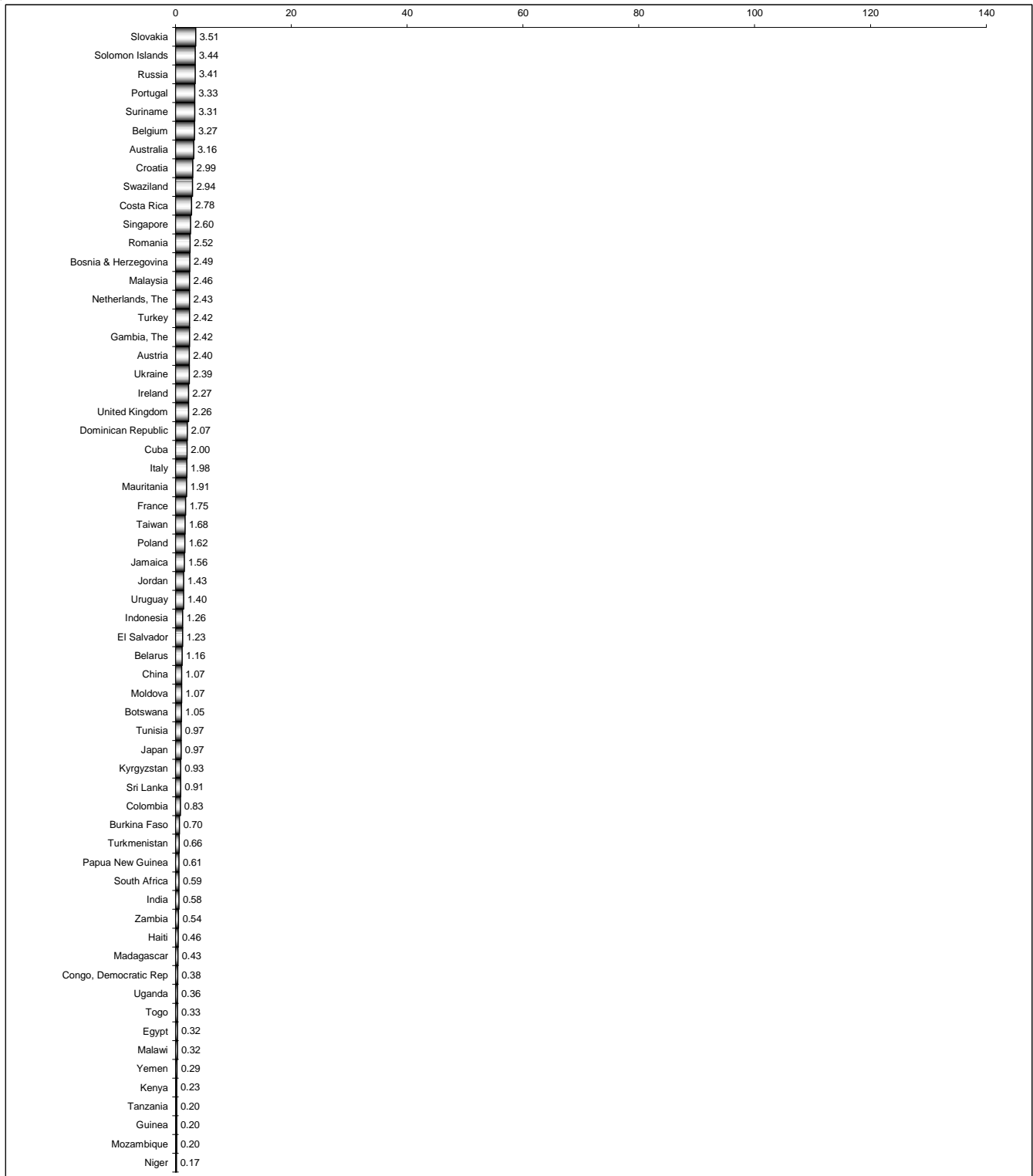
^o or latest available figures



NUMBER OF TITLES/ADULT POPULATION (TITLES PER MILLION) *using most recent available figures*



Continued opposite
For more information please see tables on previous pages

NUMBER OF TITLES/ADULT POPULATION (TITLES PER MILLION) *using most recent available figures (continued)*

For more information please see tables on previous pages



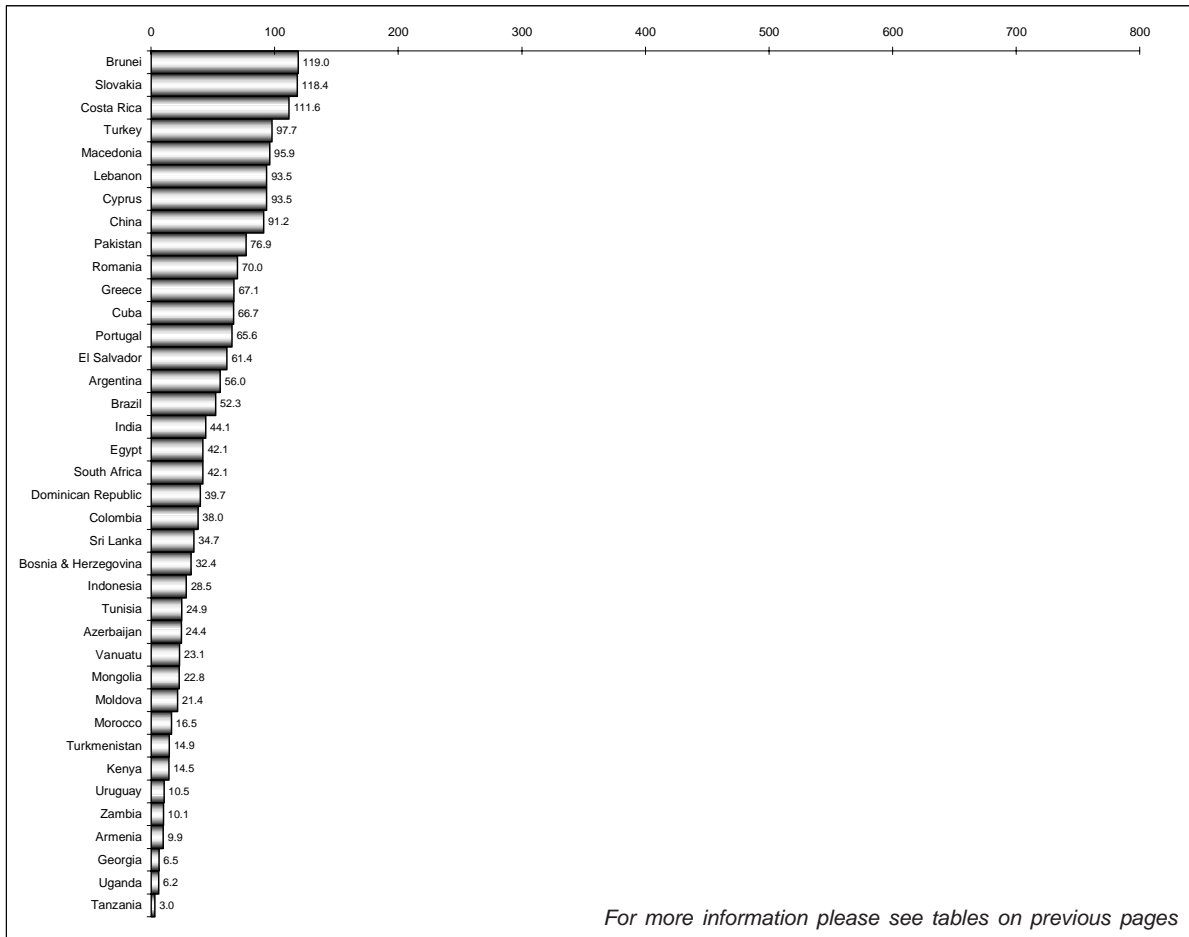
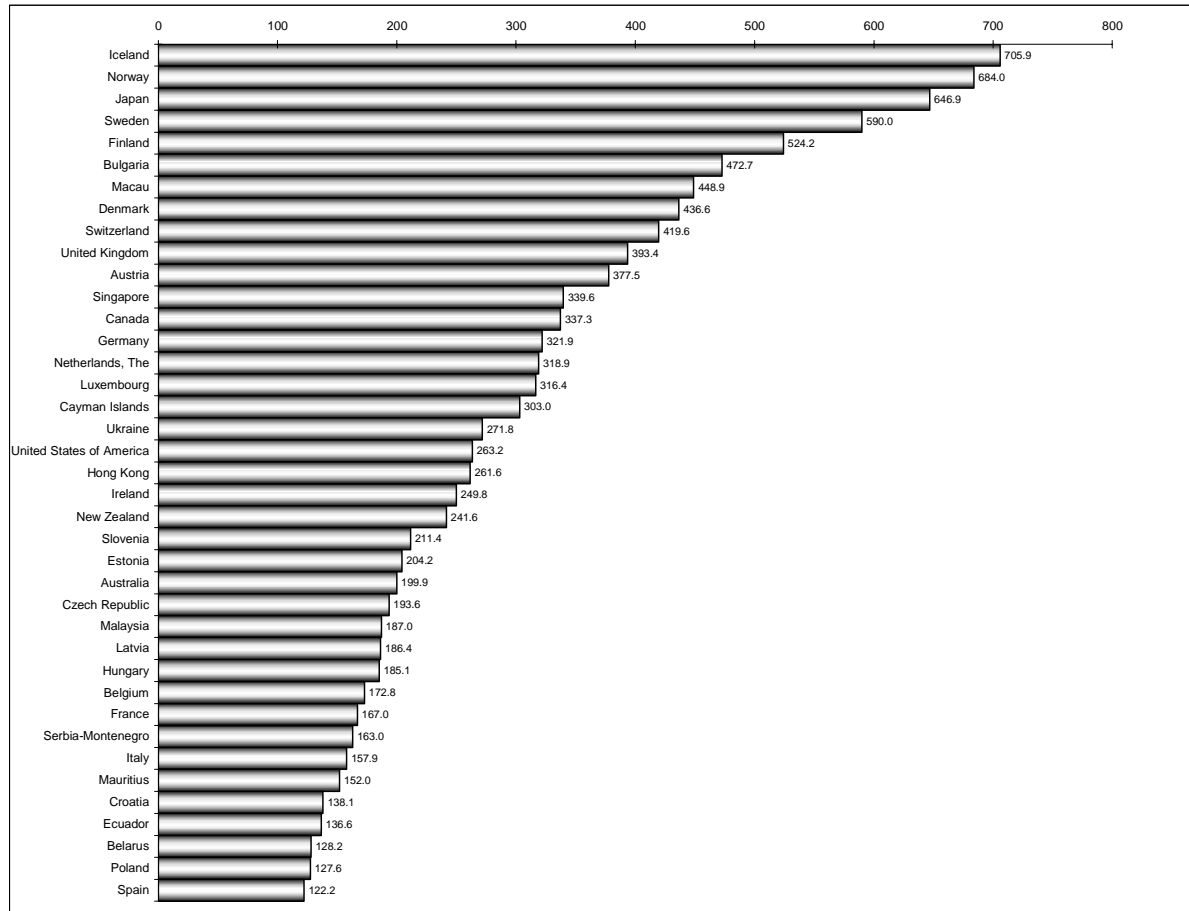
DAILIES: CIRCULATION (000)

Country						Change (%)	
	1999	2000	2001	2002	2003	1999/2003	2002/2003
Argentina	1,944	1,500	-	-	-	-	-
Armenia	-	-	-	27	-	-	-
Australia	3,107	3,083	-	-	2,970	-4.4	-
Austria	2,896	2,503	2,438	2,553	2,522	-12.9	-1.2
Azerbaijan	80	-	132	-	-	-	-
Belarus	-	1,101	-	-	-	-	-
Belgium	1,564	1,568	1,531	1,475	1,478	-5.5	0.2
Bosnia & Herzegovina	-	-	-	104	-	-	-
Brazil	7,245	7,883	7,670	6,972	6,470	-10.7	-7.2
Brunei	-	-	-	30	-	-	-
Bulgaria	1,350	1,400	-	1,400	3,039	125.1	117.1
Canada	5,166	5,167	5,185	5,005	4,930	-4.6	-1.5
Cayman Islands	-	-	-	10	-	-	-
China	70,090	75,603	82,047	85,470	-	-	-
Colombia	1,093	-	-	-	-	-	-
Costa Rica	290	275	301	288	281	-3.1	-2.4
Croatia	536	595	493	597	508	-5.2	-14.9
Cuba	565	600	-	-	-	-	-
Cyprus	45	46	-	-	-	-	-
Czech Republic	1,764	1,704	1,727	1,690	1,667	-5.5	-1.4
Denmark	1,528	1,481	1,456	1,433	1,875	22.7	30.8
Dominican Republic	230	230	-	-	-	-	-
Ecuador	1,220	1,220	-	-	-	-	-
Egypt	2,080	-	-	-	-	-	-
El Salvador	-	-	-	250	-	-	-
Estonia	273	262	258	255	251	-8.1	-1.6
Finland	2,331	2,304	2,309	2,268	2,243	-3.8	-1.1
France	8,212	8,182	8,164	7,877	8,026	-2.3	1.9
Georgia	43	26	-	-	-	-	-
Germany	24,565	23,946	23,838	23,267	22,571	-8.1	-3.0
Greece	676	681	671	628	622	-8.0	-1.0
Hong Kong	1,528	1,481	-	-	-	-	-
Hungary	1,659	1,624	1,665	1,595	1,540	-7.2	-3.4
Iceland	91	91	149	152	156	71.4	2.6
India	25,587	29,752	29,482	31,085	31,410	22.8	1.0
Indonesia	4,782	-	-	4,665	4,567	-4.5	-2.1
Ireland	567	574	588	591	772	36.2	30.6
Italy	5,914	6,273	7,627	7,906	7,911	33.8	0.1
Japan	72,218	71,896	71,694	70,815	70,339	-2.6	-0.7
Kenya	250	-	-	-	-	-	-
Latvia	321	322	343	387	358	11.5	-7.5
Lebanon	225	215	215	215	215	-4.4	0.0
Luxembourg	124	120	120	118	115	-7.1	-2.4
Macau	157	167	-	-	-	-	-
Macedonia	-	-	177	130	150	-	15.4
Malaysia	-	2,191	2,399	2,334	2,429	-	4.1
Mauritius	116	138	-	-	-	-	-
Moldova	-	-	-	60	-	-	-
Mongolia	40	44	39	42	38	-5.0	-9.5
Morocco	728	846	-	-	350	-51.9	-
Netherlands, The	4,482	4,443	4,375	4,311	4,204	-6.2	-2.5
New Zealand	780	777	764	745	739	-5.3	-0.8
Norway	2,591	2,578	2,527	2,524	2,450	-5.4	-2.9
Pakistan	5,584	5,600	5,726	6,009	-	-	-
Poland	2,958	2,820	4,001	3,854	3,934	33.0	2.1
Portugal	686	1,026	614	595	571	-16.8	-4.0
Romania	-	-	1,279	-	-	-	-
Serbia-Montenegro	-	-	-	1,015	-	-	-
Singapore	1,078	1,096	1,050	1,045	-	-	-
Slovakia	1,116	541	503	512	506	-54.7	-1.2
Slovenia	341	-	-	344	-	-	-
South Africa	-	1,118	1,169	1,137	1,286	-	13.1
Spain	4,173	4,261	4,274	4,157	4,200	0.6	1.0
Sri Lanka	-	536	497	493	-	-	-
Sweden	3,721	4,100	4,078	4,068	4,282	15.1	5.3
Switzerland	2,679	2,666	2,634	2,594	2,539	-5.2	-2.1
Tanzania	-	-	-	102	-	-	-
Tunisia	-	180	-	-	-	-	-
Turkey	4,432	4,047	3,281	3,306	2,538	-42.7	-23.2
Turkmenistan	26	32	-	-	45	73.1	-
Uganda	-	63	69	-	-	-	-
Ukraine	4,322	-	-	-	-	-	-
United Kingdom	18,839	19,159	19,117	19,186	18,591	-1.3	-3.1
United States of America	55,979	55,773	55,578	55,186	55,185	-1.4	0.0
Uruguay	-	42	38	-	30	-	-
Vanuatu	-	-	-	3	-	-	-
Zambia	-	-	-	56	-	-	-

Note: many countries now include free dailies in their dailies total. Please see country entries for details.



AVERAGE CIRCULATION/ADULT POPULATION (COPIES PER THOUSAND) *using most recent available figures*



For more information please see tables on previous pages



DAILIES: TOTAL ANNUAL SALES (MILLIONS OF COPIES)

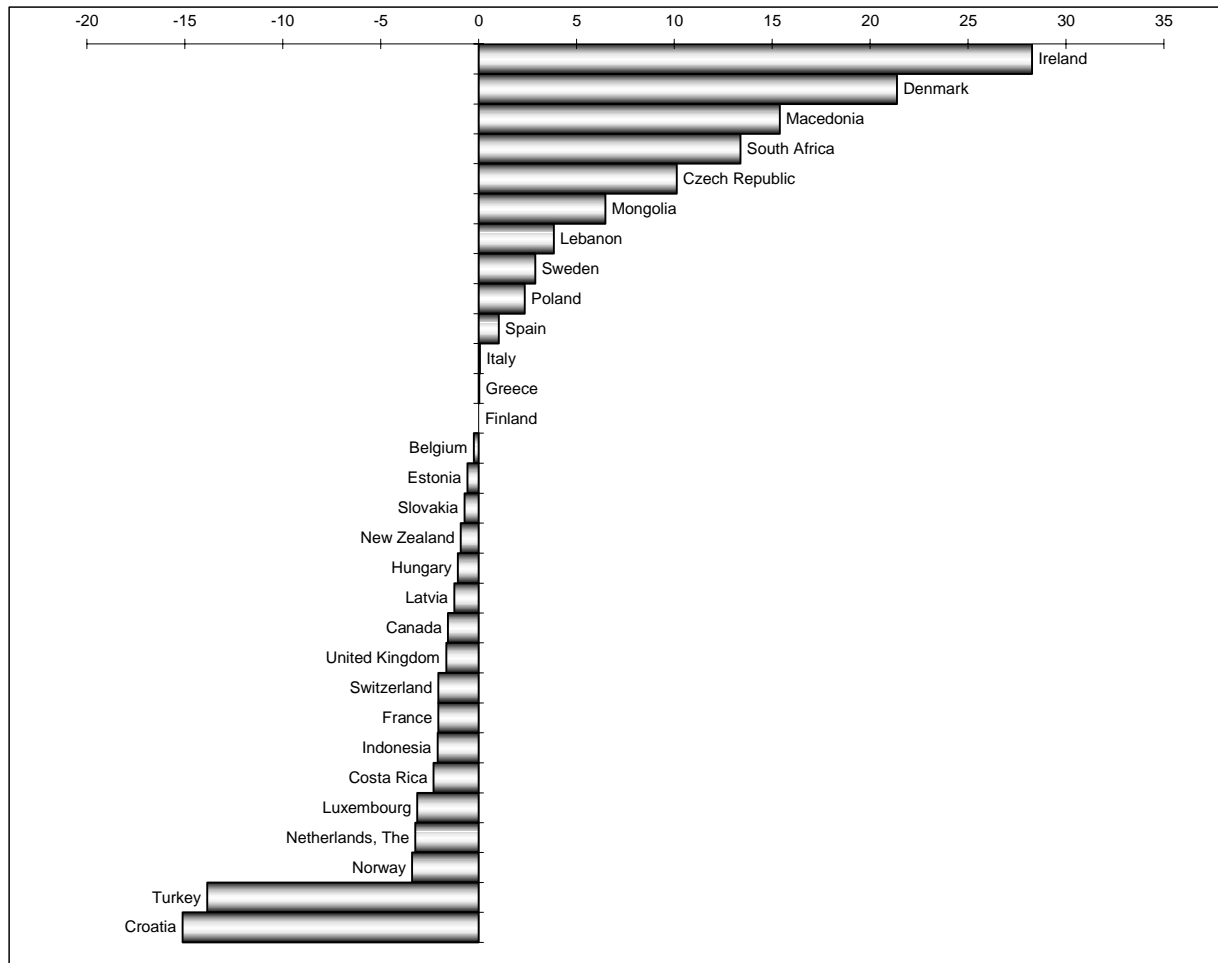
Country	1999	2000	2001	2002	2003	Change (%)	
						1999/2003	2002/2003
Argentina	700	550	-	-	-	-	-
Australia	943	930	-	-	950	0.8	-
Belgium	468	467	453	440	439	-6.2	-0.2
Canada	1,746	1,749	1,753	1,696	1,670	-4.4	-1.6
Chile	335	348	354	-	248	-26.0	-
Colombia	399	-	-	-	-	-	-
Costa Rica	105	96	104	99	97	-8.0	-2.3
Croatia	159	163	173	214	182	14.3	-15.1
Cyprus	14	14	-	-	-	-	-
Czech Republic	520	509	514	494	544	4.6	10.1
Denmark	549	530	519	510	619	12.8	21.4
East Timor	0.4	0.7	0.6	-	-	-	-
Estonia	76	75	72	70	70	-7.3	-0.6
Finland	773	764	767	759	759	-1.8	0.0
France	2,555	2,572	2,562	2,487	2,436	-4.7	-2.1
Greece	191	192	194	187	187	-2.1	0.0
Hong Kong	477	530	-	-	-	-	-
Hungary	514	488	515	474	469	-8.8	-1.1
Iceland ¹	26	28	24	22	-	-	-
Indonesia	1,720	-	-	1,679	1,644	-4.4	-2.1
Ireland	177	179	183	184	236	33.3	28.3
Italy	2,061	2,137	2,529	2,555	2,557	24.1	0.1
Latvia	65	65	73	81	80	23.1	-1.2
Lebanon	51	48	50	52	54	6.7	3.8
Luxembourg	38	33	35	35	34	-10.3	-3.1
Macedonia	-	-	42	41	47	-	15.4
Malaysia	-	657	720	700	-	-	-
Mexico	-	-	-	553	-	-	-
Mongolia	11	13	11	11	11	2.9	6.5
Netherlands, The	1,376	1,364	1,338	1,333	1,290	-6.3	-3.2
New Zealand	242	242	238	232	230	-5.2	-0.9
Norway	769	762	750	743	718	-6.6	-3.4
Poland	833	846	1,192	1,070	1,095	31.5	2.4
Portugal	227	-	546	519	-	-	-
Serbia-Montenegro	-	-	-	293	-	-	-
Singapore	332	342	326	327	-	-	-
Slovakia	290	138	132	156	155	-46.6	-0.7
South Africa	-	280	292	284	322	-	13.4
Spain	1,511	1,543	1,547	1,505	1,520	0.6	1.0
Sri Lanka	-	177	164	163	-	-	-
Sweden	1,251	1,237	1,233	1,227	1,262	0.9	2.9
Switzerland	813	805	796	783	767	-5.7	-2.0
Tanzania	-	-	-	36	-	-	-
Turkey	1,434	1,309	1,061	1,068	920	-35.8	-13.9
Uganda	-	22	25	-	-	-	-
United Kingdom	5,824	5,822	5,784	5,716	5,622	-3.5	-1.6
United States of America	17,465	-	-	-	-	-	-
Uruguay	-	15	14	-	11	-	-

Note: many countries now include free dailies in their dailies total. Please see country entries for details.

¹ national dailies only



CHANGE IN TOTAL ANNUAL SALES (NUMBER OF COPIES), 2002/2003 (%)



For more information please see table on previous page



DAILIES: ADVERTISING REVENUES

Country	1999	2000	2001	2002	2003	US\$ million 2003 *	Change (%) current prices 1999/2003	Change (%) constant prices 1999/2003	Change (%) current prices 2002/2003	Change (%) constant prices 2002/2003
Armenia (Dram million)	-	-	-	30	-	0.1	-	-	-	-
Australia (A\$ million)	2,012	2,142	-	1,888	2,033	1,106	1.1	-12.8	7.7	4.3
Austria (€ million)	543	590	571	537	548	515	0.8	-7.0	1.9	0.6
Belgium (€ million)	335	350	351	352	411	387	22.6	13.2	16.7	15.0
Brazil (R\$ million)	1,800	2,110	1,975	1,919	2,006	687	11.4	-19.8	4.5	-6.7
Bulgaria (US\$ million)	16	16	20	56	65	65	316.7	213.7	16.1	9.5
Canada (C\$ million)	2,429	2,580	2,501	2,510	2,510	1,600	3.3	-6.7	0.0	-2.7
Chile (Peso million)	120,354	117,862	98,866	101,379	107,461	156	-10.7	-21.4	6.0	2.8
China (RMB million)	11,230	14,650	15,770	18,800	21,000	2,537	87.0	85.7	11.7	10.9
Colombia (Peso million)	477,470	476,000	488,376	574,908	-	230	-	-	-	-
Croatia (Kuna million)** 1	220	177	285	112	412	52	87.1	-	268.8	-
Czech Republic (Koruna million)	4,207	4,900	5,228	6,021	6,389	195	51.9	34.4	6.1	3.9
Denmark (Krone million)	-	2,611	2,503	2,827	2,945	373	-	-	4.2	1.7
East Timor (US\$ million)	-	-	-	0.08	0.11	0.11	-	-	37.5	-
Estonia (Kroon million)	201	217	224	224	252	15	25.4	8.4	12.5	10.8
Finland (€ million)	493	528	496	475	484	455	-1.8	-10.3	1.9	0.5
France (€ million)	1,670	1,828	1,651	1,426	1,374	1,293	-17.7	-23.6	-3.6	-5.7
Germany (€ million)	6,066	6,557	5,642	4,937	5,075	4,774	-16.3	-21.8	2.8	1.7
Greece (€ million)	137	141	117	118	182	171	32.7	16.6	54.3	49.7
Hong Kong (HK\$ million) 2	8,607	10,177	10,264	-	-	1,316	-	-	-	-
Hungary (HUF million)	28,014	31,313	34,528	35,850	39,913	155	42.5	8.3	11.3	6.7
Iceland (ISK million)	2,476	2,707	2,432	2,409	2,938	32	18.7	-0.2	22.0	20.8
India (Rupees million)	3,482	4,419	3,768	4,450	4,762	98	36.8	17.2	7.0	2.9
Indonesia (Rupiah billion)	1,415	1,982	2,593	3,502	-	376	-	-	-	-
Ireland (€ million)	-	-	-	-	561	528	-	-	-	-
Israel (US\$ million)	174	202	185	165	210	210	20.9	18.1	27.5	26.4
Italy (€ million)	1,429	1,770	1,659	1,538	1,530	1,439	7.1	-3.2	-0.5	-3.2
Japan (Yen billion)	845	901	869	781	773	6,165	-8.5	-5.8	-1.0	-0.5
Kenya (KSh million) 1	1,430	1,745	1,817	-	-	23	-	-	-	-
Latvia (Lat million)	9	9	10	11	11	18	24.9	38.8	5.2	2.6
Lebanon (L£ million)	23,520	20,250	18,000	27,750	22,500	15	-4.3	-	-18.9	-
Lithuania (US\$ million)	32	24	26	36	32	32	-2.2	-7.3	-11.6	-12.9
Luxembourg (€ million)	54	62	64	64	67	63	25.2	-	4.6	-
Macedonia (Denar million)	-	-	-	308	-	5	-	-	-	-
Malaysia (Ringgit million) 1	1,471	1,866	1,936	2,146	2,365	622	60.8	51.9	10.2	9.2
Netherlands, The (€ million)	616	654	601	576	658	619	6.9	-6.0	14.2	11.5
New Zealand (NZ\$ million) 1	566	596	606	628	689	320	21.7	10.6	9.7	7.8
Norway (Kroner million)	6,900	7,700	7,700	7,200	7,010	878	1.6	-8.5	-2.6	-5.7
Peru (US\$ million)	109	95	108	-	-	108	-	-	-	-
Poland (Zloty million)	753	982	1,056	1,056	1,528	375	102.9	69.0	44.7	42.7
Portugal (€ million)	-	-	-	244	-	230	-	-	-	-
Russia (US\$ million)	-	-	-	-	108	108	-	-	-	-
Slovakia (SKK million)	-	835	1,035	1,152	1,418	31	-	-	23.1	19.3
Slovenia (SIT million)	6,590	-	-	-	-	27	-	-	-	-
South Africa (Rand million)	1,343	1,407	1,445	1,758	1,756	167	30.7	0.5	-0.1	-6.3
Spain (€ million)	1,530	1,692	1,594	1,531	1,110	1,044	-27.4	-36.3	-27.5	-29.7
Sri Lanka (Rupees million) 1	1,321	1,800	1,920	2,110	-	22	-	-	-	-
Sweden (SKr million)	8,527	9,052	8,082	7,504	7,506	771	-12.0	-18.1	0.0	-1.6
Switzerland (SF million)	1,669	1,784	1,673	1,391	1,418	910	-15.0	-18.2	1.9	1.3
Taiwan (NT\$ million)	18,858	18,746	16,414	12,196	-	354	-	-	-	-
Thailand (Baht million) 1	9,344	12,054	-	-	-	281	-	-	-	-
Turkey (Lira billion)	140,000	229,500	262,900	382,500	459,272	305	228.1	-26.1	20.1	-6.2
Uganda (Shilling million)	-	15,600	17,200	-	-	10	-	-	-	-
Ukraine (US\$ million)	-	-	-	38	13	13	-	-	-66.1	-
United Kingdom (£ million)	2,168	2,472	2,388	2,310	2,327	3,493	7.3	-0.5	0.7	-0.7
United States of America (US\$ million)	46,289	48,670	44,305	44,102	44,939	44,939	-2.9	-12.0	1.9	-0.3
Uruguay (Peso million)	-	497	328	279	325	15	-	-	16.5	7.4

* or most recently available figure

Note: many countries now include free dailies in their dailies total. Please see country entries for details.

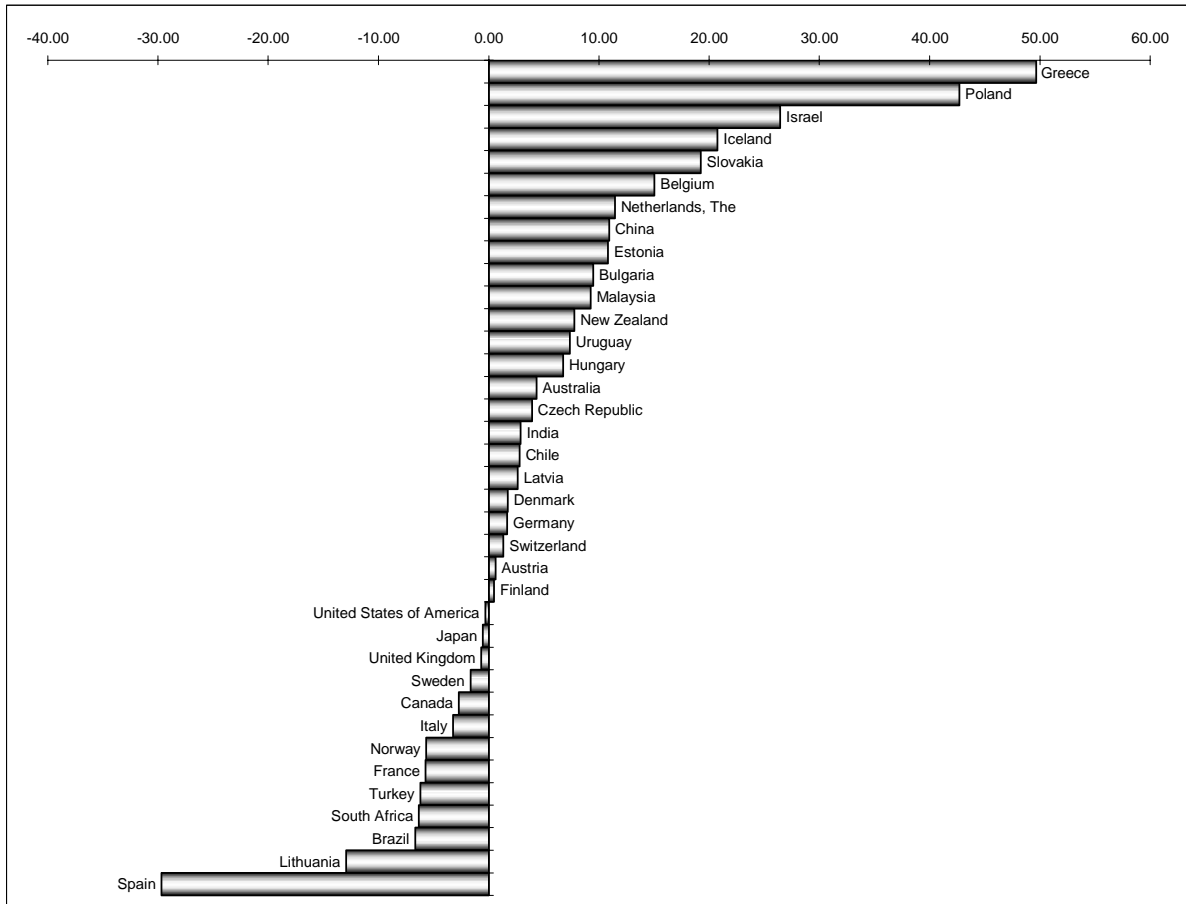
1 all newspapers

2 dailies and non-dailies

** National and regional newspapers in 2003; only regional newspapers in previous years



CHANGE IN ADVERTISING REVENUES (CONSTANT PRICES), 2002/2003 (%)



For more information please see table on previous page



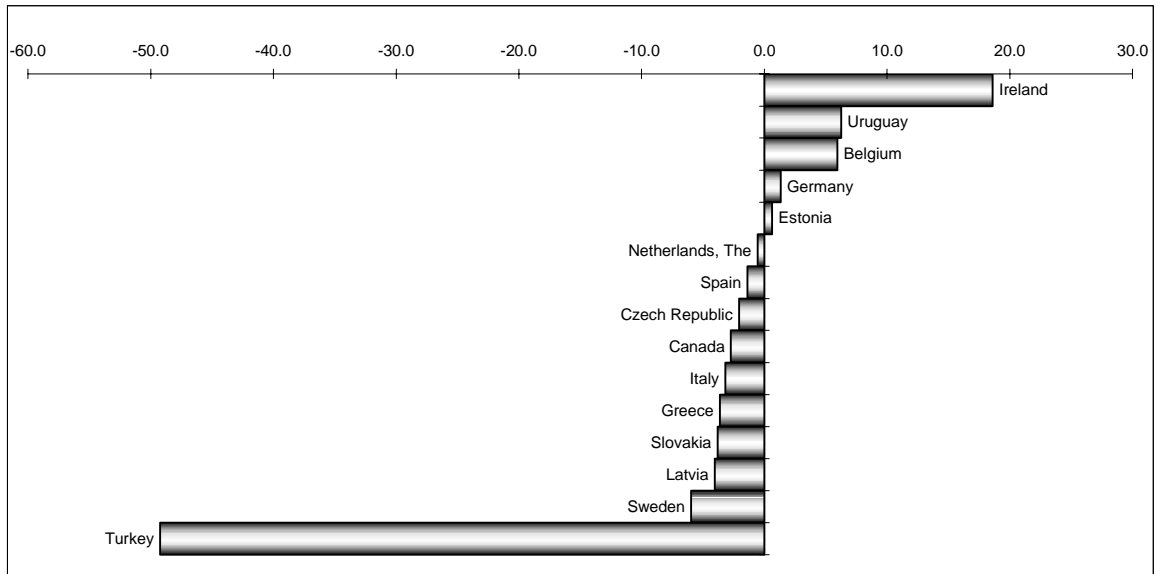
DAILIES: SALES REVENUES

Country	1999	2000	2001	2002	2003	US\$ million 2003 *	Change (%) current prices 1999/2003	Change (%) constant prices 1999/2003	Change (%) current prices 2002/2003	Change (%) constant prices 2002/2003
Armenia (Dram million)	-	-	-	600	-	1.5	-	-	-	-
Australia (A\$ million)	956	1,041	-	-	1,116	607	16.7	-	0.8	-
Belgium (€ million)	268	276	277	278	299	281	11.4	7.4	2.9	6.0
Canada (C\$ million)	703	692	682	674	674	430	-4.1	0.0	-13.4	-2.7
Colombia (Peso million)	9,391	-	-	-	-	4	-	-	-	-
Costa Rica (Colones million)	7,200	8,532	11,400	-	-	32	-	-	-	-
Croatia (Kuna million)	-	-	992	1,286	1,096	139	-	-14.8	-	-
Cyprus (C€ million)	6	6	-	-	-	9	-	-	-	-
Czech Republic (Koruna million)	3,850	3,820	3,900	3,797	3,797	116	-1.4	0.0	-12.8	-2.1
Denmark (Krone million)	3,738	3,818	-	3,910	-	495	-	-	-	-
East Timor (US\$ million)	-	-	0.37	0.31	-	0.31	-	-	-	-
Estonia (Kroon million)	239	227	232	235	240	14	0.4	2.1	-13.2	0.6
Finland (€ million)	402	408	429	-	-	404	-	-	-	-
France (€ million)	3,522	3,507	3,681	-	-	3,463	-	-	-	-
Germany (€ million)	3,522	3,507	3,681	3,800	3,893	3,662	10.5	2.4	3.3	1.3
Greece (€ million)	120	131	127	185	184	173	53.3	-0.6	34.6	-3.6
Iceland (ISK million)	1,580	1,561	1,622	1,567	-	17	-	-	-	-
Ireland (€ million)	184	180	-	211	259	244	40.7	22.7	17.2	18.6
Italy (€ million)	1,164	1,186	1,198	1,326	1,320	1,242	13.4	-0.5	2.6	-3.2
Japan (Yen billion)	1,288	1,284	1,286	1,283	-	10,232	-	-	-	-
Latvia (Lat million)	12	13	15	17	16	26	40.8	-1.6	56.4	-4.0
Lebanon (L£ million)	53,100	50,400	53,000	56,000	58,000	38	9.2	3.6	-	-
Luxembourg (€ million)	15	15	15	17	18	17	23.9	6.8	-	-
Macedonia (Denar million)	-	-	416	413	468	7	-	13.2	-	-
Mongolia (Tugrik million)	1,813	2,583	2,640	2,866	3,053	3	68.4	6.5	-	-
Netherlands, The (€ million)	782	806	845	880	897	844	14.7	1.9	0.9	-0.6
Norway (Kroner million)	4,104	-	-	-	7,000	877	70.6	-	53.7	-
Portugal (€ million)	126	-	-	159	-	150	-	-	-	-
Serbia-Montenegro (Dinar million)	-	-	-	4,400	-	77	-	-	-	-
Slovakia (SKK million)	-	-	-	1,560	1,549	34	-	-0.7	-	-3.8
Spain (€ million)	1,028	1,078	1,138	1,141	1,160	1,091	12.9	1.7	-0.9	-1.4
Sri Lanka (Rupees million) ¹	-	780	830	-	-	9	-	-	-	-
Sweden (SKr million)	6,536	7,093	-	6,825	6,526	670	-0.2	-4.4	-7.1	-6.0
Tanzania (Tsh million)	-	-	-	7,200	-	7	-	-	-	-
Turkey (Lira billion)	145,000	366,230	492,136	390,165	253,522	168	74.8	-35.0	-60.6	-49.2
United Kingdom (£ million)	1,350	1,358	1,381	1,398	-	2,098	-	-	-	-
United States of America (US\$ million)	6,475	6,508	6,690	6,830	-	6,830	-	-	-	-
Uruguay (Pesos million)	-	222	272	209	241	11	-	15.3	-	6.3

¹ dailies and non-dailies



CHANGE IN SALES REVENUES (CONSTANT PRICES), 2002/2003 (%)



For more information please see table on previous page



NON-DAILIES: NUMBER OF TITLES

Country	1999	2000	2001	2002	2003	Change (%)		no. of titles/adult population (million)	
						1999/2003	2002/2003	1999 ^a	2003 ^b
Albania	-	-	79	77	-	-	-	30.7	29.9
Anguilla	-	-	-	2	-	-	-	181.8	181.8
Armenia	-	-	40	41	-	-	-	14.7	15.0
Australia	96	97	-	95	117	21.9	23.2	6.5	7.9
Austria	152	120	118	123	106	-30.3	-13.8	22.8	15.9
Azerbaijan	329	-	-	-	11	-96.7	-	60.9	2.0
Belarus	-	600	-	-	-	-	-	69.9	69.9
Bhutan	-	-	-	1	1	-	0.0	0.8	0.8
Bosnia & Herzegovina	-	-	-	67	-	-	-	20.8	20.8
Botswana	-	-	-	8	-	-	-	8.4	8.4
Brazil	1,780	2,020	1,498	2,161	2,464	38.4	14.0	14.4	19.9
Bulgaria	115	114	114	62	221	92.2	256.5	17.9	34.4
Cape Verde	-	-	-	4	-	-	-	16.5	16.5
Chile	6	9	12	12	32	433.3	166.7	0.5	2.9
China	1,233	1,098	1,014	1,130	-	-	-	1.3	1.2
Colombia	4	-	-	-	-	-	-	0.1	0.1
Cook Islands	-	-	-	2	-	-	-	95.2	95.2
Costa Rica	27	27	22	22	29	7.4	31.8	10.7	11.5
Croatia	237	245	174	181	202	-14.8	11.6	64.4	54.9
Cuba	31	31	-	-	-	-	-	3.4	3.4
Cyprus	10	10	-	-	-	-	-	20.3	20.3
Czech Republic	71	62	86	83	81	14.1	-2.4	8.2	9.4
Denmark	281	282	279	279	301	7.1	7.9	65.4	70.1
Dominican Republic	8	8	-	7	-	-	-	1.4	1.2
East Timor	1	1	1	2	4	300.0	100.0	1.9	7.8
Ecuador	40	40	-	-	-	-	-	4.5	4.5
Egypt	45	-	-	-	-	-	-	0.9	0.9
Estonia	50	49	52	50	47	-6.0	-6.0	40.7	38.2
Finland	151	149	146	146	146	-3.3	0.0	35.3	34.1
France	245	-	-	-	-	-	-	5.1	5.1
Georgia	122	-	-	-	-	-	-	30.4	30.4
Germany	1,335	1,336	1,360	1,335	1,317	-1.3	-1.3	19.0	18.8
Greece	17	14	15	17	24	41.2	41.2	1.8	2.6
Greenland	-	-	-	2	-	-	-	47.6	47.6
Hungary	169	167	188	195	203	20.1	4.1	20.3	24.4
Iceland	22	20	21	23	26	18.2	13.0	99.5	117.6
India	-	-	-	46,322	-	-	-	65.1	65.1
Indonesia	425	746	306	289	331	-22.1	14.5	2.6	2.1
Ireland	61	61	-	-	53	-13.1	-	19.7	17.2
Jordan	17	20	-	-	-	-	-	4.9	5.7
Kenya	10	-	-	-	-	-	-	0.6	0.6
Korea, Republic Of	5,318	4,708	4,647	-	-	-	-	146.3	127.9
Kyrgyzstan	164	181	-	-	-	-	-	50.7	55.9

Continued opposite



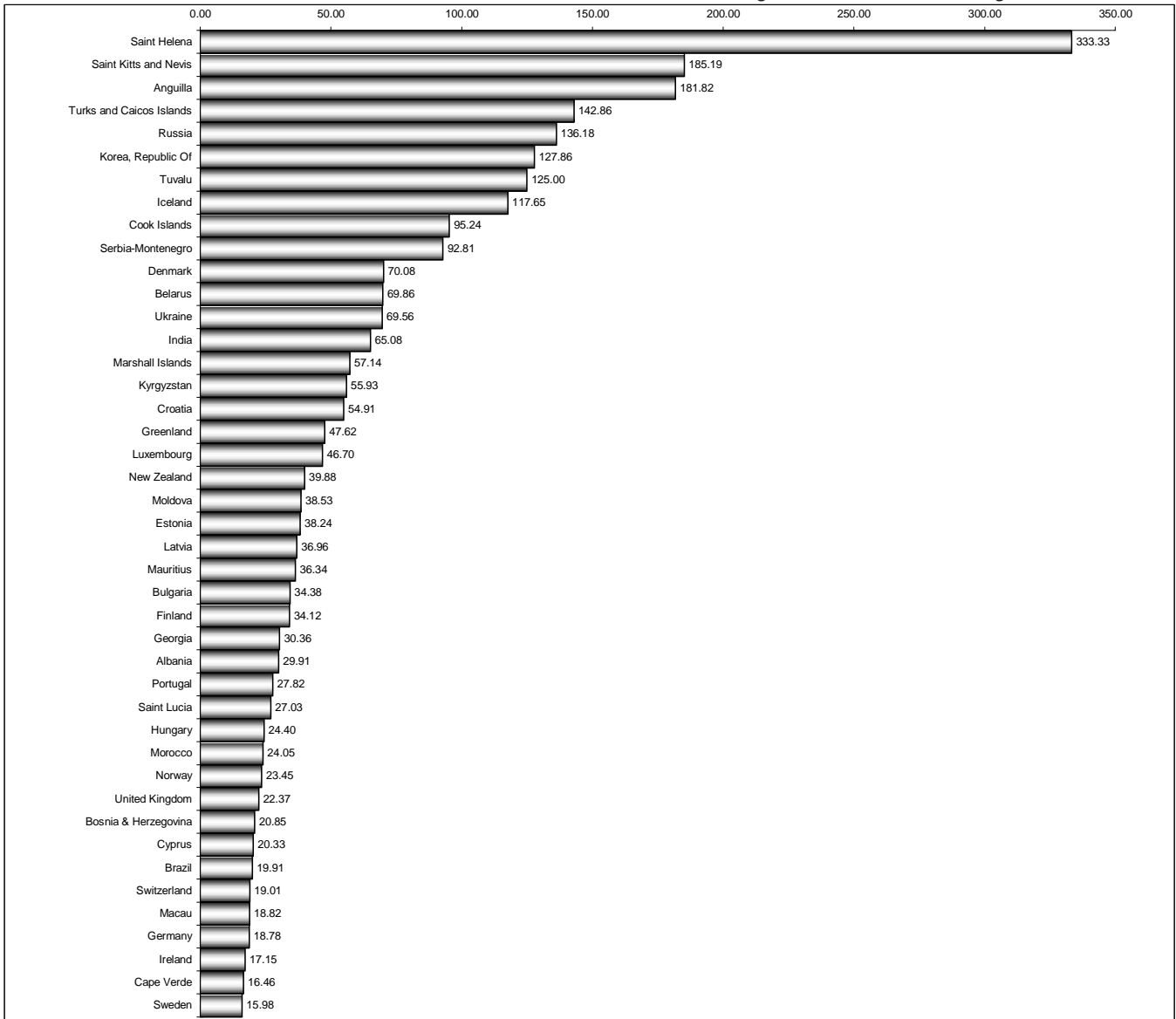
NON-DAILIES: NUMBER OF TITLES (continued)

Country	1999	2000	2001	2002	2003	Change (%)		no. of titles/adult population (million)	
						1999/2003	2002/2003	1999 [^]	2003 ^o
Latvia	62	60	64	65	71	14.5	9.2	32.3	37.0
Lebanon	-	-	2	3	4	-	33.3	0.9	1.7
Luxembourg	20	21	21	20	17	-15.0	-15.0	54.9	46.7
Macau	8	7	-	-	-	-	-	21.5	18.8
Macedonia	-	-	33	30	9	-	-70.0	21.1	5.8
Malaysia	-	1	2	2	2	-	0.0	0.1	0.2
Mali	-	-	-	4	-	-	-	0.7	0.7
Marshall Islands	-	-	-	2	-	-	-	57.1	57.1
Mauritius	31	33	-	-	-	-	-	34.1	36.3
Mexico	-	-	-	16	11	-	-31.3	0.2	0.1
Moldova	-	-	-	108	-	-	-	38.5	38.5
Mongolia	12	6	4	5	3	-75.0	-40.0	7.2	1.8
Morocco	581	507	-	-	509	-12.4	-	27.4	24.0
Netherlands, The	54	49	48	46	42	-22.2	-8.7	4.1	3.2
New Zealand	122	125	119	120	122	0.0	1.7	39.9	39.9
Norway	74	72	71	77	84	13.5	9.1	20.7	23.5
Pakistan	2,604	1,221	1,190	-	-	-	-	33.3	15.2
Poland	-	-	15	21	17	-	-19.0	0.5	0.6
Portugal	242	-	-	242	242	0.0	0.0	27.8	27.8
Romania	-	-	78	-	-	-	-	4.3	4.3
Russia	8,285	10,188	12,854	15,393	17,949	116.6	16.6	62.9	136.2
Rwanda	11	13	-	-	-	-	-	2.4	2.9
Saint Helena	-	-	-	2	-	-	-	333.3	333.3
Saint Kitts and Nevis	-	-	-	5	-	-	-	185.2	185.2
Saint Lucia	-	-	-	3	-	-	-	27.0	27.0
Serbia-Montenegro	-	-	-	578	-	-	-	92.8	92.8
Singapore	2	3	2	2	-	-	-	0.6	0.6
Slovakia	2	2	1	-	-	-	-	0.5	0.2
Slovenia	14	-	-	25	-	-	-	8.6	15.4
South Africa	259	261	276	285	286	10.4	0.4	8.5	9.4
Spain	10	-	-	-	-	-	-	0.3	0.3
Sri Lanka	-	36	38	37	-	-	-	2.5	2.6
Sweden	71	109	108	115	116	63.4	0.9	9.8	16.0
Switzerland	124	124	122	121	115	-7.3	-5.0	20.5	19.0
Tanzania	-	-	-	1	-	-	-	0.0	0.0
Tunisia	-	29	-	-	-	-	-	4.0	4.0
Turkmenistan	23	22	-	-	20	-13.0	-	7.6	6.6
Turks and Caicos Islands	-	-	-	2	-	-	-	142.9	142.9
Tuvalu	-	-	-	1	-	-	-	125.0	125.0
Uganda	16	9	6	-	-	-	-	1.4	0.5
Ukraine	1,106	-	-	-	-	-	-	69.6	69.6
United Kingdom	1,059	1,031	952	1,030	1,057	-0.2	2.6	22.4	22.4
Yemen	-	-	-	8	-	-	-	0.8	0.8
TOTAL	27,364	26,144	26,178	71,107	26,392	-3.6	-62.9	-	-
Number of countries	56	50	41	58	39				

Note: many countries now include free non-dailies in their non-dailies total. Please see country entries for details.

[^] or earliest available figures

^o or latest available figures


NUMBER OF TITLES/ADULT POPULATION (TITLES PER MILLION) using most recent available figures


*Continued opposite
For more information please see tables on previous pages*

NUMBER OF TITLES/ADULT POPULATION (TITLES PER MILLION) *using most recent available figures (continued)*

For more information please see tables on previous pages



NON-DAILIES: CIRCULATION (000)

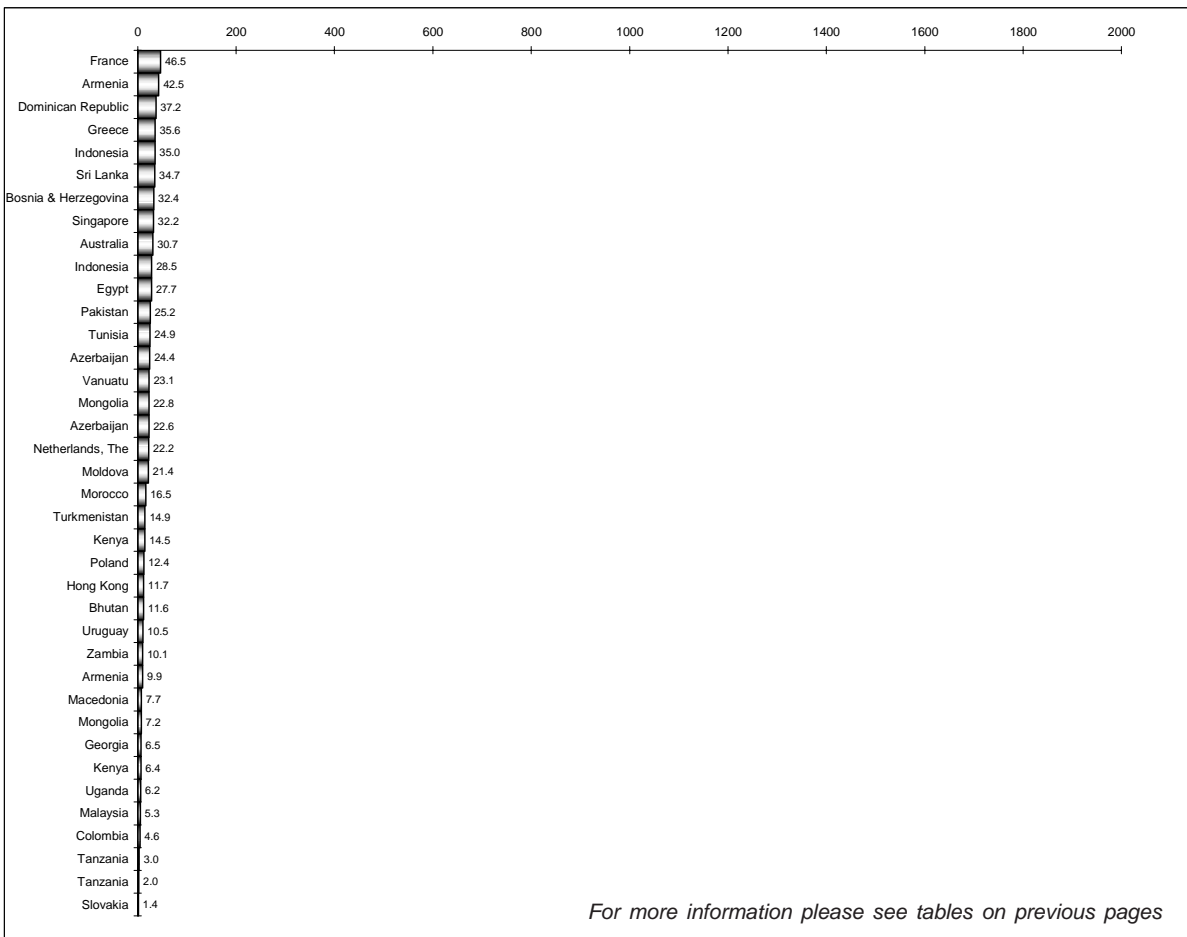
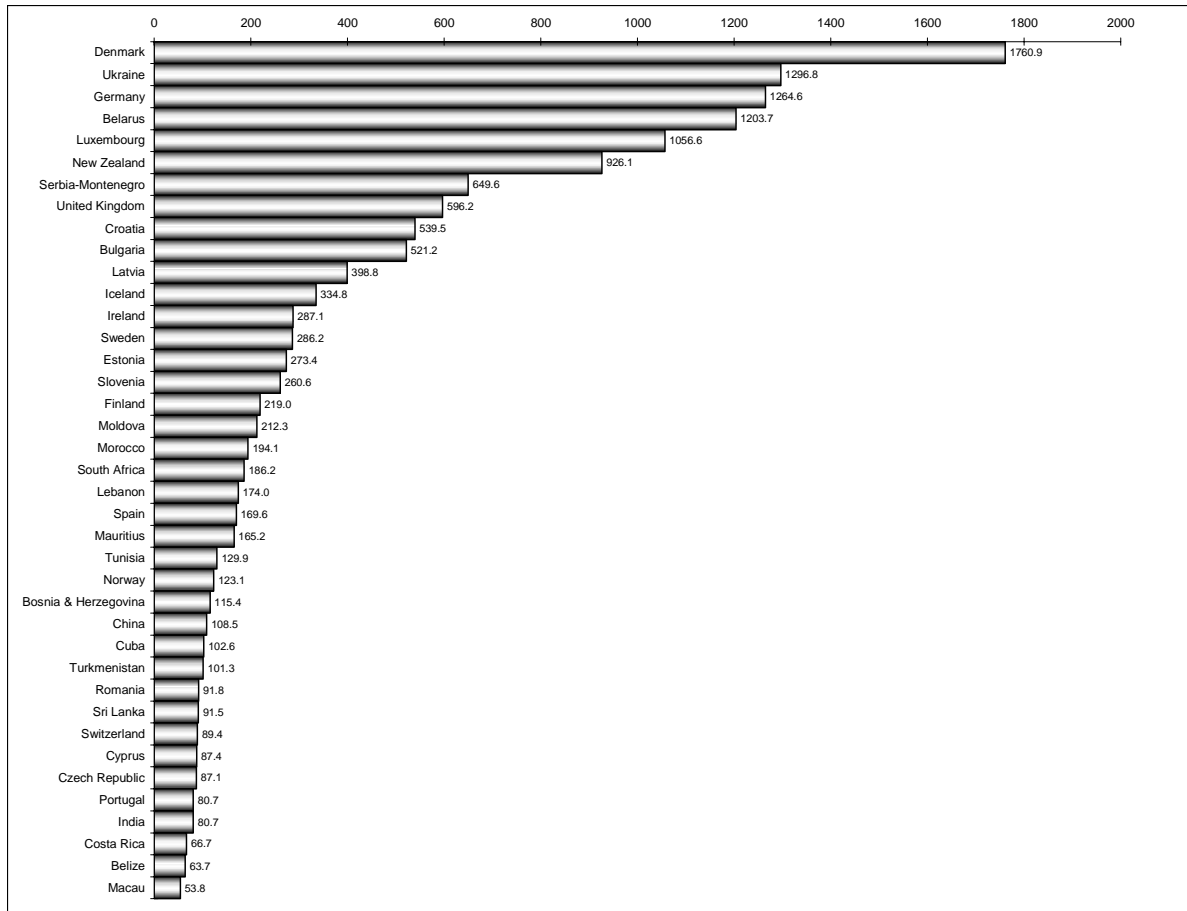
Country	1999	2000	2001	2002	2003	Change (%)	
						1999/2003	2002/2003
Armenia	-	-	-	116	-	-	-
Australia	385	381	-	-	456	18.5	-
Azerbaijan	122	-	-	-	-	-	-
Belarus	-	10,339	-	-	-	-	-
Belize	-	-	-	10	-	-	-
Bhutan	-	-	-	15	-	-	-
Bosnia & Herzegovina	-	-	-	371	-	-	-
Bulgaria	1,620	1,750	-	1,750	3,351	106.9	91.5
China	116,234	103,284	99,258	101,740	-	-	-
Colombia	131	-	-	-	-	-	-
Costa Rica ¹	138	149	159	168	-	-	-
Croatia	624	653	1,969	2,190	1,985	218.1	-9.4
Cuba	912	923	-	-	-	-	-
Cyprus	43	43	-	-	-	-	-
Czech Republic	801	765	775	739	750	-6.4	1.5
Denmark	8,205	8,208	8,326	7,442	7,563	-7.8	1.6
Dominican Republic	215	215	-	-	-	-	-
Egypt	1,371	-	-	-	-	-	-
Estonia	419	333	344	341	336	-19.8	-1.5
Finland	942	924	889	948	937	-0.6	-1.2
France	2,236	-	-	-	-	-	-
Germany	90,568	90,561	92,666	90,813	88,676	-2.1	-2.4
Greece	-	441	376	377	330	-	-12.5
Hong Kong	63	66	-	-	-	-	-
Iceland	57	57	58	74	-	-	-
India	-	-	-	57,410	-	-	-
Indonesia	7,758	-	-	5,608	5,617	-27.6	0.2
Ireland	1,372	1,354	-	1,400	887	-35.3	-36.6
Kenya	110	-	-	-	-	-	-
Latvia	905	849	884	811	766	-15.4	-5.5
Lebanon	-	-	300	300	400	-	33.3
Luxembourg	431	-	469	423	385	-10.7	-9.1
Macau	24	20	-	-	-	-	-
Macedonia	-	-	60	60	12	-	-80.0
Malaysia	-	17	40	120	69	-	-42.4
Mauritius	125	150	-	-	-	-	-
Moldova	-	-	-	595	-	-	-
Mongolia	29	4	5	4	12	-58.8	179.1
Morocco	3,724	4,108	-	-	-	-	-
Netherlands, The	337	317	313	361	293	-13.1	-18.8
New Zealand	2,727	2,746	2,767	2,718	2,833	3.9	4.2
Norway	374	365	370	395	441	17.9	11.6
Pakistan	1,727	1,759	1,863	1,967	-	-	-
Poland	-	-	506	630	383	-	-39.2
Portugal	1,152	1,134	1,338	867	702	-39.1	-19.0
Romania	-	-	1,679	-	-	-	-
Serbia-Montenegro	-	-	-	4,046	-	-	-
Singapore	69	115	95	99	-	-	-
Slovakia	15	6	6	-	-	-	-
Slovenia	424	-	-	-	-	-	-
South Africa	-	4,230	4,553	4,832	5,695	-	17.9
Spain	5,827	-	-	-	-	-	-
Sri Lanka	-	1,322	1,317	1,302	-	-	-
Sweden	379	2,581	1,712	2,309	2,077	448.0	-10.0
Switzerland	721	723	655	597	541	-25.0	-9.4
Tanzania	-	-	-	70	-	-	-
Tunisia	-	940	-	-	-	-	-
Turkmenistan	294	338	-	-	306	4.1	-
Ukraine	20,620	-	-	-	-	-	-
United Kingdom	33,024	34,379	31,965	31,712	28,175	-14.7	-11.2

Note: many countries now include free non-dailies in their non-dailies total. Please see country entries for details.

¹ national non-dailies only



AVERAGE CIRCULATION/ADULT POPULATION (COPIES PER THOUSAND) *using most recent available figures*



For more information please see tables on previous pages



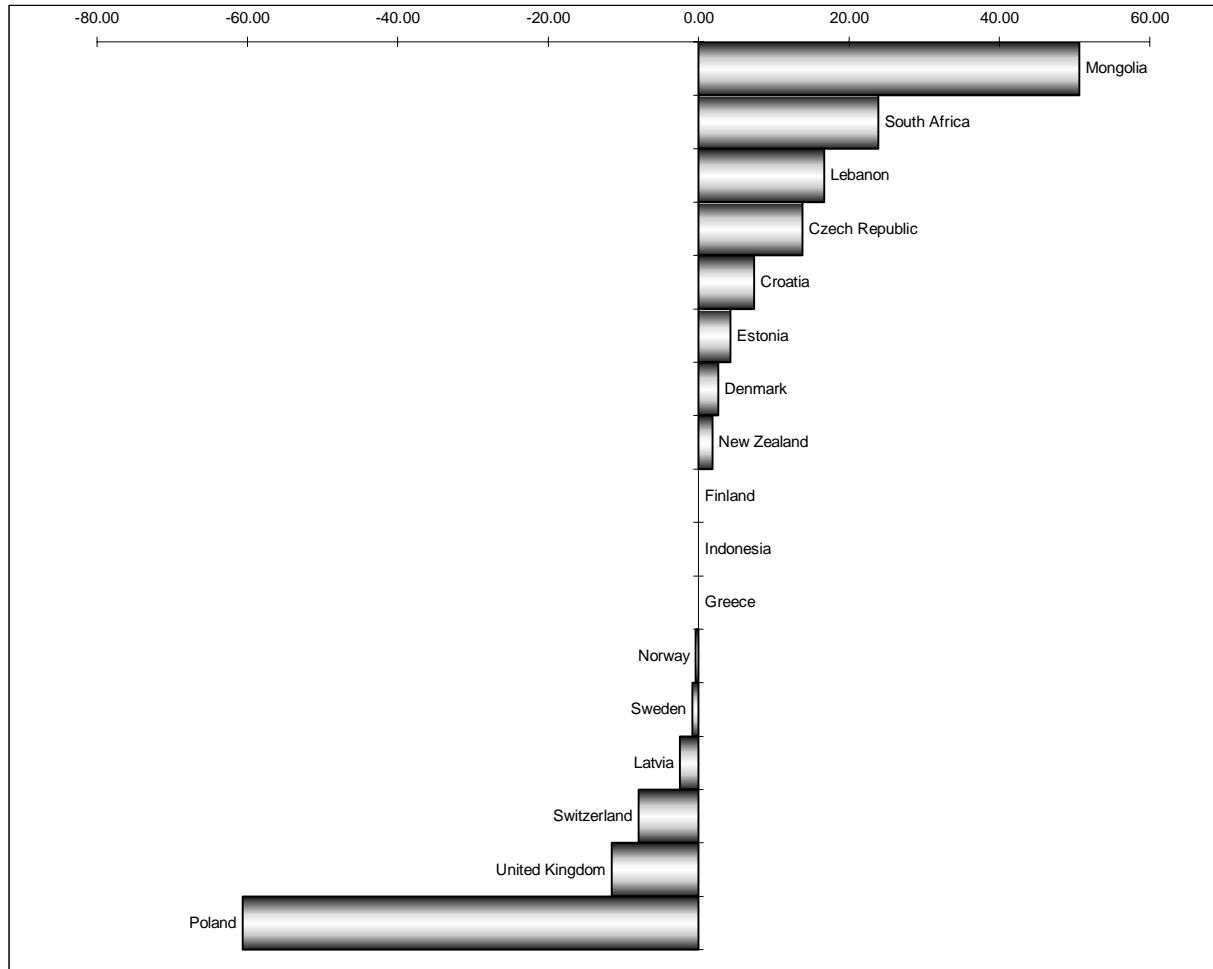
NON-DAILIES: TOTAL ANNUAL SALES (MILLIONS OF COPIES)

Country	1999	2000	2001	2002	2003	Change (%)	
						1999/2003	2002/2003
Australia	32	31	-	-	32	1.6	-
Colombia	8	-	-	-	-	-	-
Croatia	35	36	58	92	99	186.1	7.4
Cyprus	2	3	-	-	-	-	-
Czech Republic	36	40	41	37	42	16.7	13.8
Denmark	426	426	432	386	396	-7.0	2.6
East Timor	0.9	0.9	0.3	-	-	-	-
Estonia	23	24	23	21	22	-3.5	4.2
Finland	93	91	88	81	81	-12.9	0.0
Greece	-	27	23	21	21	-	0.0
Hong Kong	3	3	-	-	-	-	-
Iceland	2	1	1	-	-	-	-
Indonesia	403	-	-	292	292	-27.5	0.0
Ireland	67	67	-	-	46	-31.3	-
Latvia	54	47	44	40	39	-27.8	-2.5
Lebanon	8	16	16	24	28	250.0	16.7
Moldova	-	-	-	31	-	-	-
Mongolia	3	0	0	1	1	-52.2	50.6
Netherlands, The	24	23	23	-	-	-	-
New Zealand	189	184	185	190	193	2.2	1.8
Norway	49	48	49	51	51	4.7	-0.4
Poland	-	-	56	50	20	-	-60.6
Portugal	69	-	272	273	-	-	-
Serbia-Montenegro	-	-	-	75	-	-	-
Singapore	4	5	5	4	-	-	-
Slovakia	1	2	1	-	-	-	-
South Africa	-	217	233	230	285	-	23.9
Spain	303	-	-	-	-	-	-
Sri Lanka	-	69	69	68	-	-	-
Sweden	35	36	36	36	36	4.3	-0.8
Switzerland	57	57	54	50	46	-19.3	-8.0
Tanzania	-	-	-	34	-	-	-
United Kingdom	1,728	1,751	1,666	1,625	1,437	-16.8	-11.6

Note: many countries now include free non-dailies in their non-dailies total. Please see country entries for details.



CHANGE IN TOTAL ANNUAL SALES (NUMBER OF COPIES), 2002/2003 (%)



For more information please see table on previous page



NON-DAILIES: ADVERTISING REVENUES

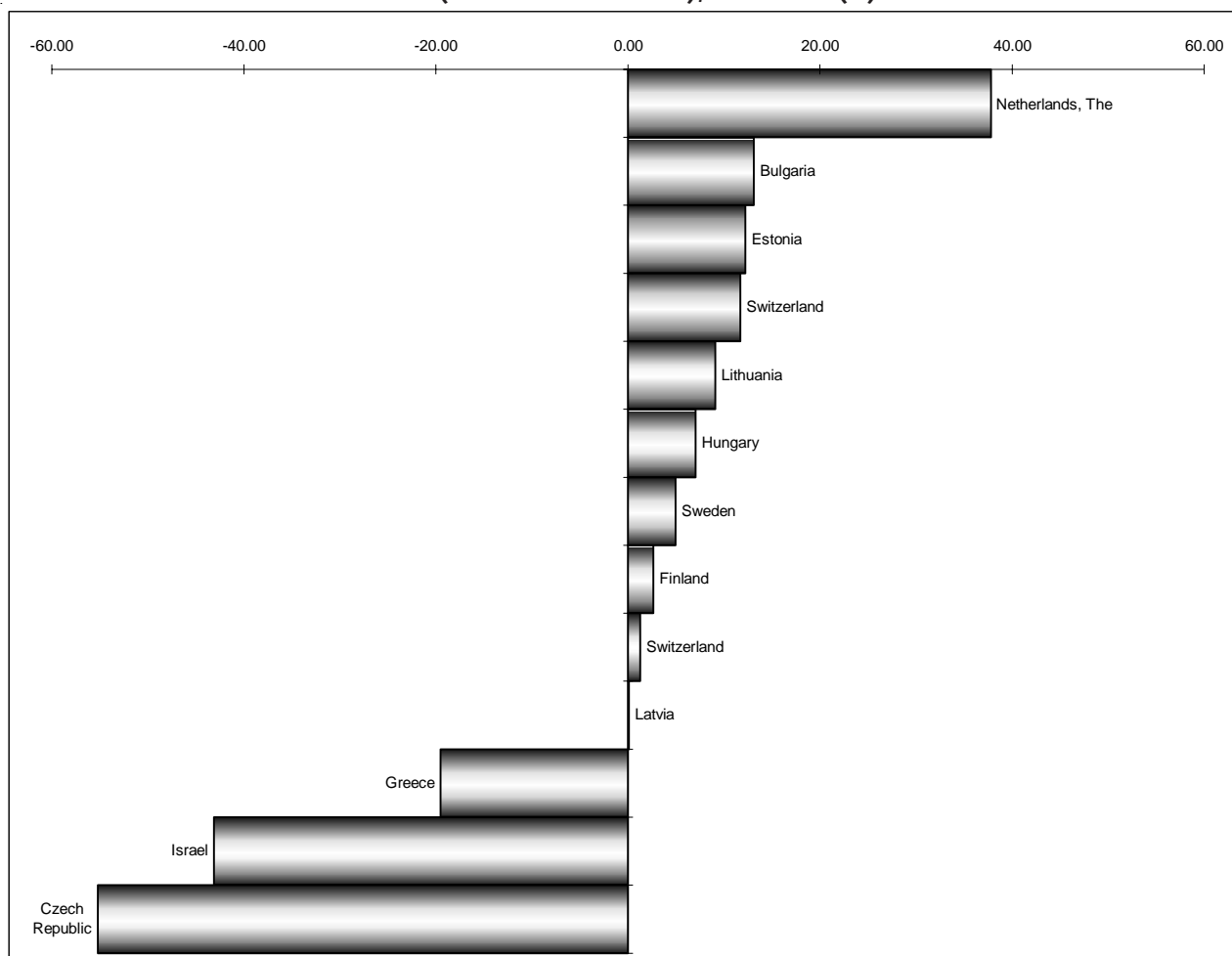
Country	1999	2000	2001	2002	2003	US\$ million 2003 *	Change (%) current prices 1999/2003	Change (%) current prices 2002/2003	Change (%) constant prices 1999/2003	Change (%) constant prices 2002/2003
Armenia (Dram million)	-	-	-	54	-	0.1	-	-	-	-
Australia (A\$ million)	229	233	-	-	243	132	6.3	-	-8.2	-
Bulgaria (US\$ million)	9	10	10	15	17	17	86.9	19.9	40.7	13.1
Czech Republic (Koruna million)	250	287	840	400	183	6	-26.8	-54.3	-35.2	-55.2
East Timor (US\$ million)	-	-	0.004	0.012	0.024	0.024	-	100.0	-	-
Estonia (Kroon million)	94	98	114	115	131	8	39.4	13.9	20.5	12.2
Finland (€ million)	52	55	51	49	51	48	-2.2	4.1	-10.6	2.6
France (€ million)	115	120	-	-	-	113	-	-	-	-
Germany (€ million) ¹	261	278	287	268	-	252	-	-	-	-
Greece (€ million)	36	48	35	32	26	25	-27.0	-17.0	-35.9	-19.5
Hungary (HUF million)	24,554	28,203	31,358	33,869	37,814	147	54.0	11.6	17.1	7.0
Iceland (ISK million)	259	294	288	357	-	4	-	-	-	-
Indonesia (Rupiah billion)	98	140	184	237	-	25	-	-	-	-
Ireland (€ million)	-	-	-	-	26	24	-	-	-	-
Israel (US\$ million)	74	87	90	85	49	10	-34.0	-42.7	-35.5	-43.1
Latvia (Lat million)	8	7	8	11	11	18	38.8	2.6	54.2	0.1
Lebanon (L£ million)	-	600	450	550	450	0.30	-	-18.2	-	-
Lithuania (US\$ million) ¹	1	1	1	2	2	2	355.0	10.7	331.3	9.1
Luxembourg (€ million) ¹	3	4	6	3	5	5	93.0	67.3	-	-
Netherlands, The (€ million) ²	21	38	48	59	83	78	296.1	41.3	248.3	37.8
Russia (US\$ million)	-	-	-	-	107	107	-	-	-	-
Slovenia (SIT million)	1,876	-	-	-	-	8	-	-	-	-
Sweden (SKr million)	226	435	243	223	238	24	5.5	6.7	-1.8	4.9
Switzerland (SF million) ¹	185	188	186	209	213	137	15.1	1.9	10.9	1.3
Tanzania (Tsh million)	-	-	-	688	-	1	-	-	-	-
Ukraine (US\$ million)	-	-	-	4	54	10	-	1122.1	-	-
United Kingdom (£ million)	1,391	1,549	1,610	1,644	-	2,468	-	-	-	-

Note: many countries now include free non-dailies in their non-dailies total. Please see country entries for details.

¹ non-dailies and Sundays

² non-dailies and free papers

CHANGE IN ADVERTISING REVENUES (CONSTANT PRICES), 2002/2003 (%)



For more information please see table above

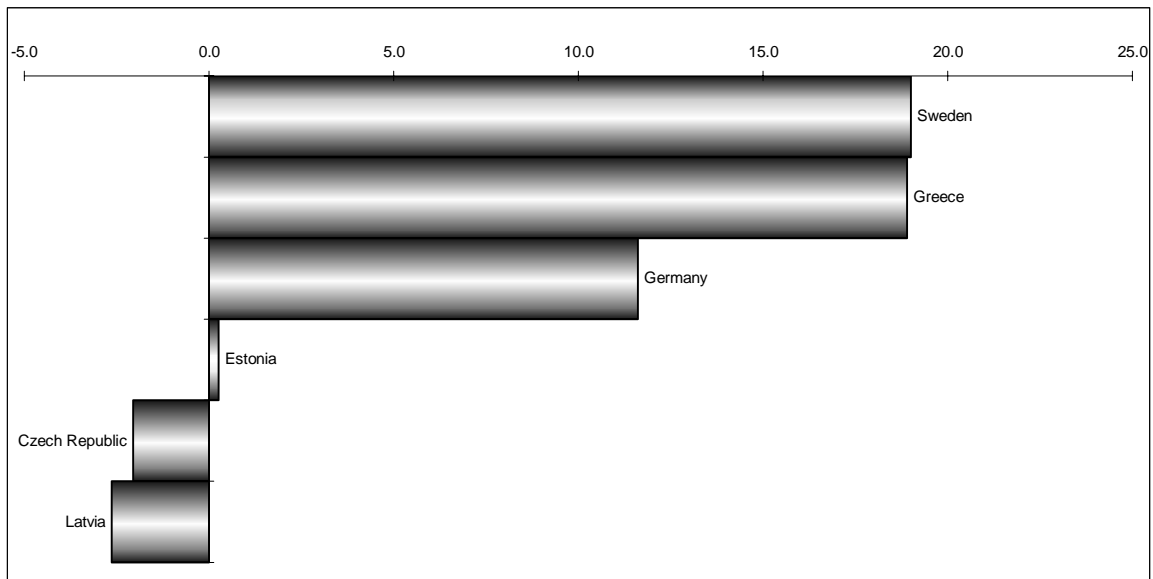


NON-DAILIES: SALES REVENUES

Country	1999	2000	2001	2002	2003	US\$ million 2003 *	Change (%) current prices 1999/2003	Change (%) current prices 2002/2003	Change (%) constant prices 1999/2003	Change (%) constant prices 2002/2003
Armenia (Dram million)	-	-	-	300	-	0.8	-	-	-	-
Australia (A\$ million)	28	31	-	-	36	20	29.5	-	11.8	-
Colombia (Peso million)	423	-	-	-	-	0	-	-	-	-
Croatia (Kuna million)	-	-	873	-	1,125	143	-	-	-	-
Cyprus (C£ million)	1	1	-	-	-	2	-	-	-	-
Czech Republic (Koruna million)	265	300	310	279	279	9	5.3	0.0	-6.9	-2.1
East Timor (US\$ million)	-	0.37	0.37	0.50	-	0.50	-	-	-	-
Estonia (Kroon million)	141	147	121	113	115	7	-18.4	1.8	-29.5	0.3
Finland (€ million)	45	45	46	51	-	48	-	-	-	-
Germany (€ million) ¹	182	184	185	226	255	240	40.1	12.8	31.0	11.6
Greece (€ million)	-	22	19	17	21	20	-	22.6	-	18.9
Iceland (ISK million)	142	158	146	129	-	1	-	-	-	-
Ireland (€ million)	42	-	-	-	10	9	-76.1	-	-80.1	-
Latvia (Lat million)	10	9	9	8	8	13	-13.5	-0.2	-3.9	-2.6
Mongolia (Tugrik million)	445	44	125	124	299	0	-32.8	140.9	-	-
Netherlands, The (€ million)	12	12	12	12	-	11	-	-	-	-
Portugal (€ million)	80	-	-	120	-	113	-	-	-	-
Serbia-Montenegro (Dinar million)	-	-	-	3,000	-	53	-	-	-	-
Spain (€ million)	445	-	-	-	-	419	-	-	-	-
Sweden (SKr million)	-	83	-	94	114	12	-	21.0	-	19.0
Tanzania (Tsh million)	-	-	-	688	-	1	-	-	-	-
United Kingdom (£ million)	83	89	90	95	-	143	-	-	-	-

¹ non-dailies and Sundays

CHANGE IN SALES REVENUES (CONSTANT PRICES), 2002/2003 (%)



For more information please see table above



SUNDAYS: NUMBER OF TITLES

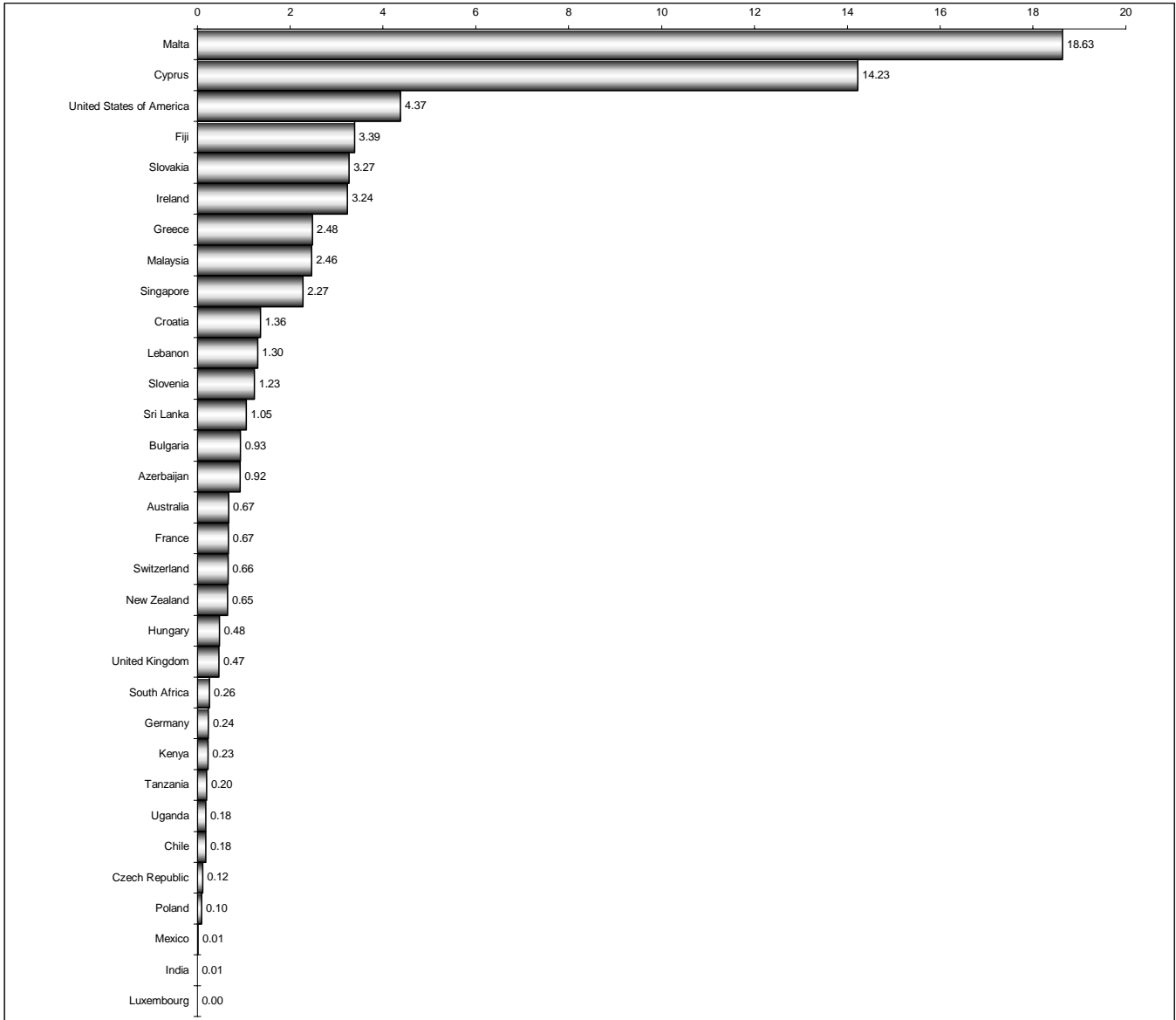
Country	1999	2000	2001	2002	2003	Change (%)		no. of titles/adult population (million)	
						1999/2003	2002/2003	1999 [^]	2003 ^o
Australia	10	10	-	11	10	0.0	-9.1	0.7	0.7
Azerbaijan	-	-	5	-	-	-	-	0.9	0.9
Bulgaria	4	6	6	-	-	-	-	0.6	0.9
Chile	1	1	1	1	2	100.0	100.0	0.1	0.2
Croatia	-	-	-	-	5	-	-	-	1.4
Cyprus	7	7	-	-	-	-	-	14.2	14.2
Czech Republic	2	1	2	1	1	-50.0	0.0	0.2	0.1
Fiji	-	-	-	2	-	-	-	3.4	3.4
France	32	-	-	-	-	-	-	0.7	0.7
Germany	7	7	7	7	17	142.9	142.9	0.1	0.2
Greece	20	20	22	21	23	15.0	9.5	2.2	2.5
Hungary	3	3	4	4	4	33.3	0.0	0.4	0.5
India	6	6	6	7	-	-	-	0.0	0.0
Ireland	5	5	5	6	10	100.0	66.7	1.6	3.2
Kenya	4	-	-	-	-	-	-	0.2	0.2
Lebanon	3	3	-	-	-	-	-	1.3	1.3
Luxembourg	1	1	1	0	0	-100.0	-	2.7	0.0
Malaysia	-	30	14	14	32	-	128.6	2.3	2.5
Malta	-	-	-	6	-	-	-	18.6	18.6
Mexico	-	-	17	1	-	-	-	0.2	0.0
New Zealand	2	2	2	2	2	0.0	0.0	0.7	0.7
Poland	-	-	1	3	3	-	0.0	0.0	0.1
Singapore	7	7	7	7	-	-	-	2.3	2.3
Slovakia	14	-	-	-	-	-	-	3.3	3.3
Slovenia	1	-	2	2	-	-	-	0.6	1.2
South Africa	6	6	7	7	8	33.3	14.3	0.2	0.3
Sri Lanka	-	15	14	15	-	-	-	1.1	1.1
Switzerland	4	4	4	5	4	0.0	-20.0	0.7	0.7
Tanzania	-	-	-	7	-	-	-	0.2	0.2
Uganda	2	-	-	-	-	-	-	0.2	0.2
United Kingdom	18	21	21	21	22	22.2	4.8	0.4	0.5
United States of America	905	916	913	913	917	1.3	0.4	4.3	4.4
TOTAL	1,064	1,071	1,061	1,063	1,060	-0.4	-0.3	0.8	0.8
Number of countries	23	20	21	23	16				

[^] or earliest available figures

^o or latest available figures



NUMBER OF TITLES/ADULT POPULATION (TITLES PER MILLION) *using most recent available figures*



For more information please see table on previous page

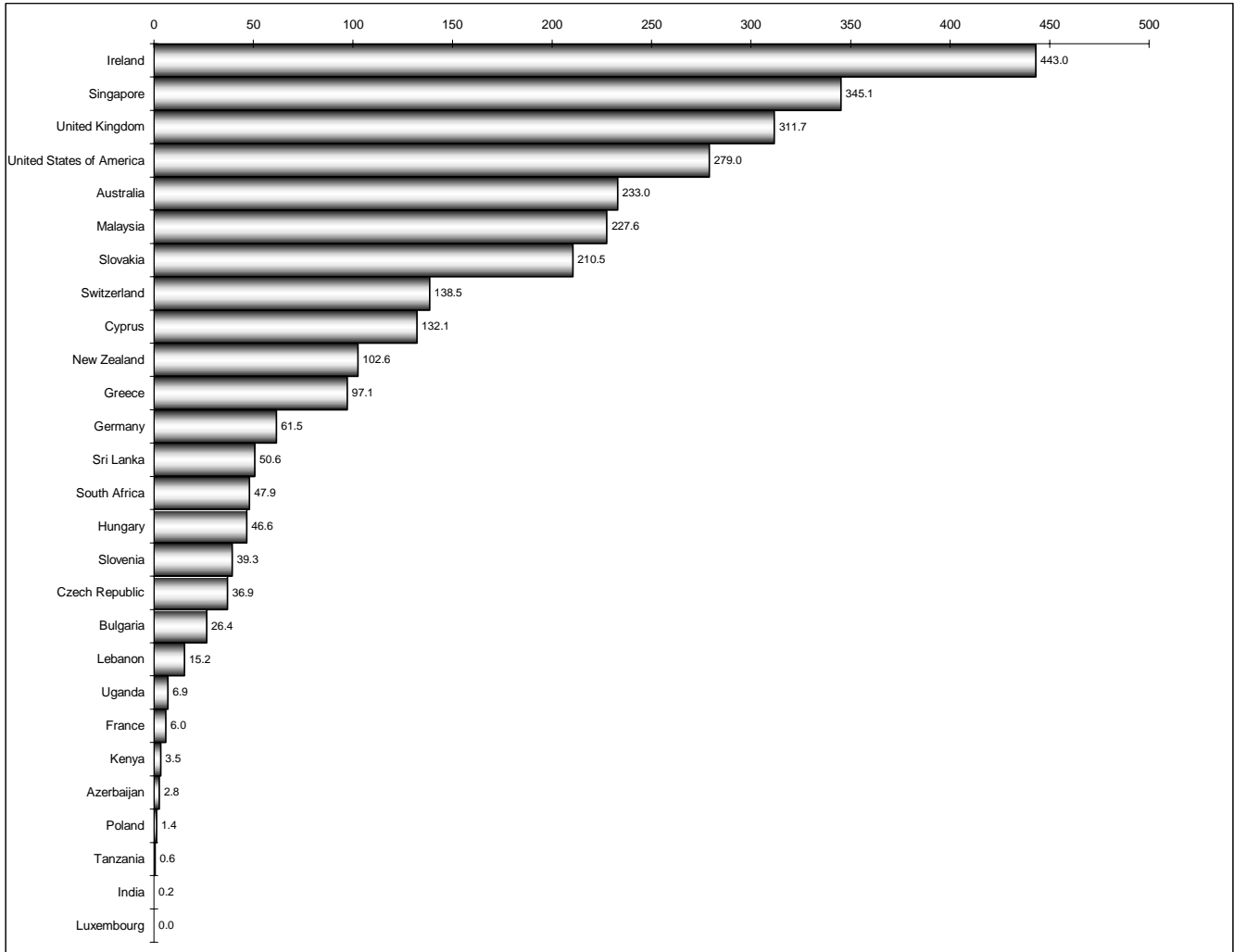


SUNDAYS: CIRCULATION (000)

Country	1999	2000	2001	2002	2003	Change (%)	
						1999/2003	2002/2003
Australia	3,441	3,416	-	-	3,461	0.6	-
Azerbaijan	-	-	15	-	-	-	-
Bulgaria	161	170	-	-	-	-	-
Cyprus	61	65	-	-	-	-	-
Czech Republic	251	229	351	308	318	26.7	3.2
France	297	280	301	295	290	-2.4	-1.7
Germany	4,475	4,485	4,481	4,485	4,315	-3.6	-3.8
Greece	-	848	881	870	900	-	3.4
Hungary	190	184	185	365	388	104.2	6.3
India	146	155	160	-	-	-	-
Ireland	827	826	809	848	1,369	65.6	61.4
Kenya	60	-	-	-	-	-	-
Lebanon	30	35	35	35	-	-	-
Luxembourg	8	-	6	0	0	-100.0	-
Malaysia	-	2,548	2,384	2,395	2,957	-	23.5
New Zealand	310	322	320	311	314	1.4	1.0
Poland	-	-	18	47	42	-	-10.6
Singapore	1,091	1,088	1,057	1,062	-	-	-
Slovakia	900	-	-	-	-	-	-
Slovenia	64	-	-	-	-	-	-
South Africa	1,310	1,274	1,281	1,449	1,465	11.9	1.1
Sri Lanka	-	1,317	723	720	-	-	-
Switzerland	827	825	817	968	838	1.3	-13.4
Tanzania	-	-	-	20	-	-	-
Uganda	-	50	77	-	-	-	-
United Kingdom	16,193	15,696	15,503	15,192	14,731	-9.0	-3.0
United States of America	59,894	59,421	59,090	58,780	58,495	-2.3	-0.5



AVERAGE CIRCULATION/ADULT POPULATION (COPIES PER THOUSAND) *using most recent available figures*



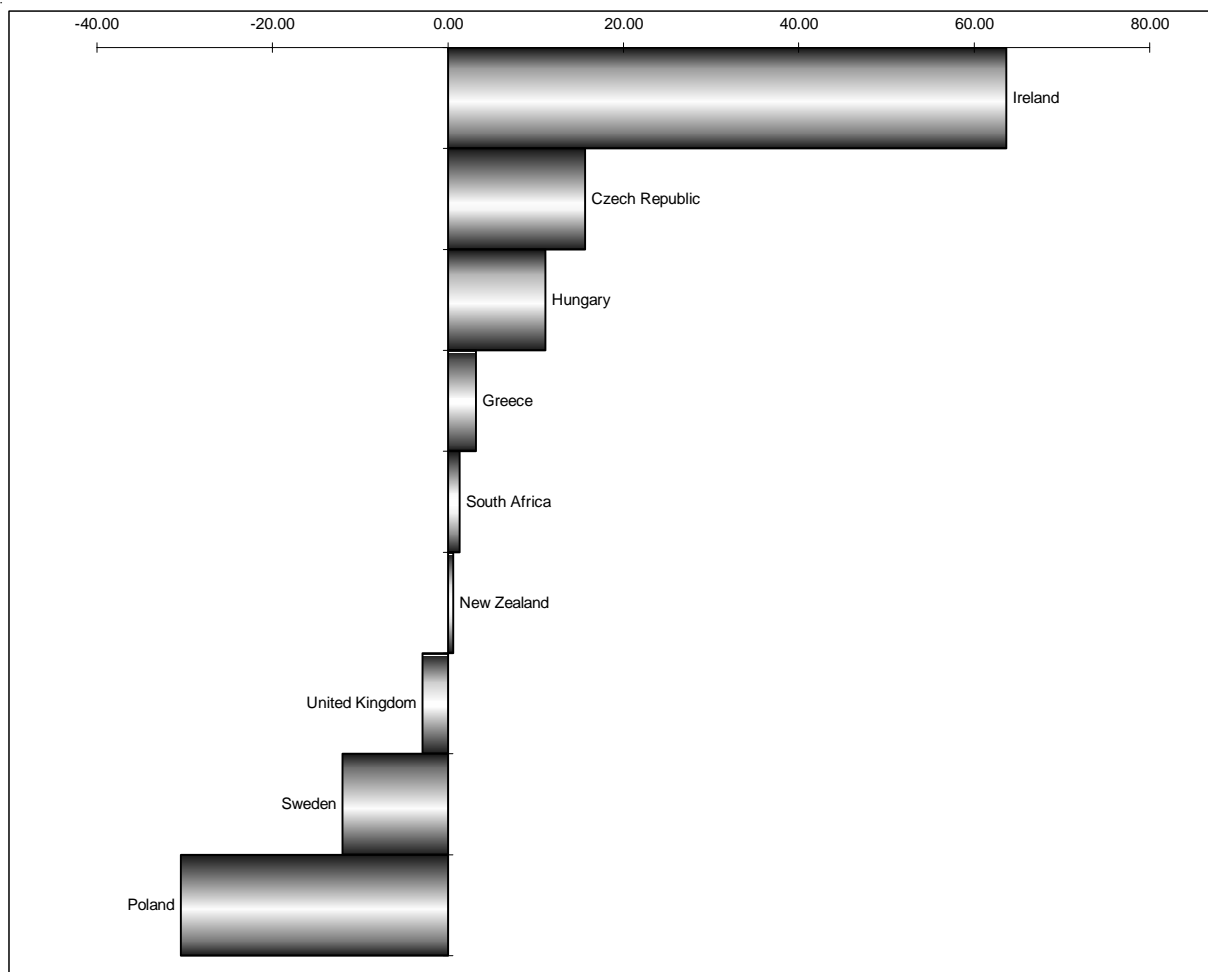
For more information please see table on previous page



SUNDAYS: TOTAL ANNUAL SALES (MILLIONS OF COPIES)

Country	1999	2000	2001	2002	2003	Change (%)	
						1999/2003	2002/2003
Australia	179	178	-	-	180	0.6	-
Cyprus	3	3	-	-	-	-	-
Czech Republic	11	13	17	15	17	54.5	15.6
Greece	-	43	45	45	46	-	3.2
Hungary	10	9	9	18	20	102.4	11.1
India	8	8	8	9	-	-	-
Ireland	43	39	42	44	72	67.4	63.6
Lebanon	1	1	1	1	-	-	-
Malaysia	-	132	124	125	-	-	-
Mexico	-	-	-	138	-	-	-
New Zealand	16	17	17	16	16	1.3	0.6
Poland	-	-	1	2	2	-	-30.4
Singapore	53	55	55	56	-	-	-
Slovakia	47	-	-	-	-	-	-
South Africa	67	65	65	74	75	11.9	1.4
Sri Lanka	-	69	38	37	-	-	-
Sweden	43	44	42	50	44	2.3	-12.0
Tanzania	-	-	-	2	-	-	-
Uganda	-	3	4	-	-	-	-
United Kingdom	809	784	775	759	737	-8.9	-2.9
United States of America	3,055	-	-	-	-	-	-

CHANGE IN TOTAL ANNUAL SALES (NUMBER OF COPIES), 2002/2003 (%)



For more information please see table above

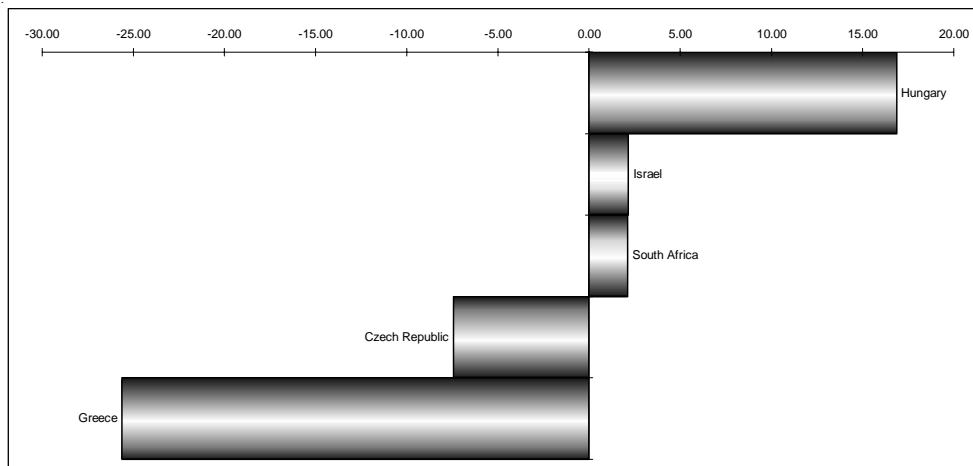


SUNDAYS: ADVERTISING REVENUES

Country	1999	2000	2001	2002	2003	US\$ million 2003 *	Change (%) current prices		Change (%) constant prices	
							1999/2003	2002/2003	1999/2003	2002/2003
Australia (A\$ million)	309	322	-	-	329	179	6.6	-	-	-
Bulgaria (US\$ million)	1	1	1	-	-	1	-	-	-8.0	-
Czech Republic (Koruna million)	27	48	55	73	69	2	160.4	-5.5	130.3	-7.4
France (€ million)	95	103	-	-	-	97	-	-	-	-
Greece (€ million)	110	113	104	123	94	89	-14.4	-23.3	-24.8	-25.6
Hungary (HUF million)	134	311	495	639	779	3	481.3	21.9	342.0	16.9
Ireland (€ million)	-	-	-	-	142	134	-	-	-	-
Israel (US\$ million)	137	149	144	130	134	28	-2.5	3.0	-4.7	2.2
South Africa (Rand million)	570	657	652	814	886	84	55.4	8.8	19.5	2.1
Spain (€ million)	109	117	111	107	-	100	-	-	-	-
Uganda (Shilling million)	-	1,800	2,800	-	-	2	-	-	-	-
United Kingdom (£ million) ¹	546	579	519	478	-	718	-	-	-	-
United States of America (US\$ million)	3,997	4,033	4,093	4,196	-	4,196	-	-	-	-

¹ national Sundays only

CHANGE IN ADVERTISING REVENUES (CONSTANT PRICES), 2002/2003 (%)



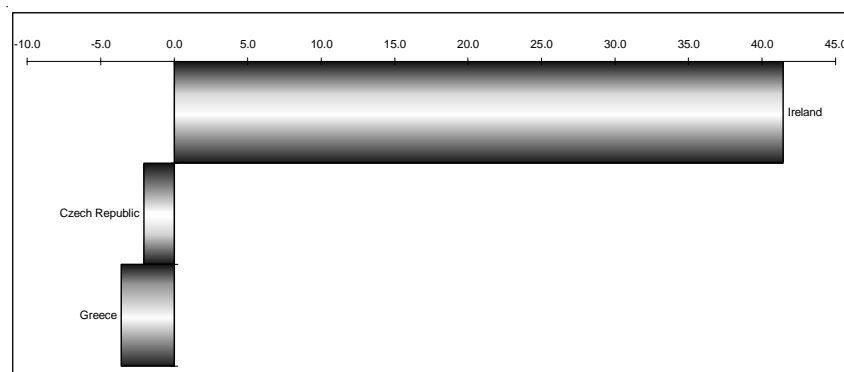
For more information please see table above

SUNDAYS: SALES REVENUES

Country	1999	2000	2001	2002	2003	US\$ million 2003 *	Change (%) current prices		Change (%) constant prices	
							1999/2003	2002/2003	1999/2003	2002/2003
Australia (A\$ million)	228	247	-	-	282	153	23.5	-	6.6	-
Cyprus (C£ million)	1	1	-	-	-	2	-	-	-	-
Czech Republic (Koruna million)	115	146	200	174	174	5	51.3	0.0	33.9	-2.1
Greece (€ million)	-	39	49	56	56	53	-	-0.6	-	-3.6
Ireland (€ million)	56	60	-	69	101	95	80.8	46.4	50.7	41.4
Lebanon (£ million)	980	980	1,000	1,100	-	1	-	-	-	-
Sri Lanka (Rupees million)	-	420	450	-	-	5	-	-	-	-
Tanzania (Tsh million)	-	-	-	320	-	0.3	-	-	-	-
United Kingdom (£ million) ¹	337	348	359	376	-	564	-	-	-	-

¹ national Sundays only

CHANGE IN SALES REVENUES (CONSTANT PRICES), 2002/2003 (%)



For more information please see table above

Report on Worldwide Press Distribution

Summary of Findings

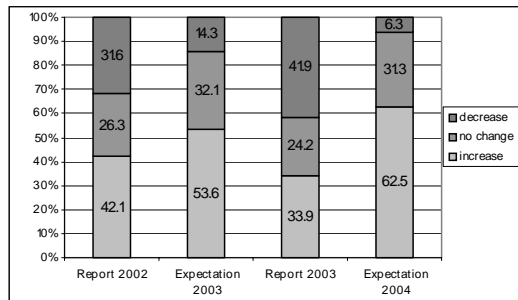
At the end of 2003, as in the year before, member companies of Distripres were invited to inform about market conditions and market developments in their fields of activity.

The survey focused on the evaluation of current developments and trends as well as on the structures of international press distribution. In this context publishers, press distributors and exporters around the world were contacted.

The results of the survey overall reveal that the global economic climate also influenced the international flow of publications. Whereas export markets for press products stagnated in Europe, North America, the Middle East and Africa in the year 2003, the indicators included in the survey showed a slight increase for Asia regarding circulation as well as revenue. In Latin America the market recovered slightly in comparison with the previous year.

Expectations and development of export revenue of publishers 2002 to 2004

(figures reported by publishers)



Compared with expectations of industry experts the business year 2003 finished below the expectations at the beginning of the year. Early in 2003 54 percent of the publishers interviewed expected a sales increase, but only 34 percent reported a rise at the end of the year. Forecasts for 2004 are even more optimistic: 64 percent of publishers are expecting rising sales.

The difference in the development of dailies compared with less frequent publications is rather striking: Where as only 23 percent of distribution companies noted an increase in the circulation of dailies, 42 percent observed a decline; weeklies and titles appearing less frequently performed considerably better. Only 29 percent of distributors registered a decline. We find a similar situation with publishing houses: Only 19 percent of publishers report an increase in daily newspapers exported, but an increase in 45 percent of cases seems to have taken place with publications appearing weekly or less frequently.

Worth noticing is the difference in business evolution between large and small publishing houses. The majority of large publishers look back at a satisfactory business year with an increase in export sales, more than 60 percent of small publishers

Report 2002 Report 2003	Europe		North America		Middle East		Asia Pacific		Africa		Latin America	
	2	3	2	3	2	3	2	3	2	3	2	3
Number of press sales points	↓	↔/↓	↑	↔	↑	↑	↑	↑	↑	↑	↓	↔
Number of press sales points carrying international/foreign press	↔	↔/↑	↑	↔	↑	↑	↑	↑	↑	↔	↓	↔

↑ = increase, ↔/↑ = slight increase, ↔ = stable, ↔/↓ = slight decrease, ↓ = decrease

however had to report dropping results.

Overall the picture of an industry struggling for stability is emerging, which shows unmistakable signs of structural change, but with significant regional disparities.

The International Retail Network 2002/2003

Development of the number of press sales points worldwide 2002 and 2003

(figures reported by regional distributors)

Press Imports 2003

Daily newspapers - Development of the number of titles, overall circulation and sales 2003

(figures reported by regional distributors)

Report 2003	Europe	North America	Middle East	Asia Pacific	Africa	Latin America
Number of international/foreign newspaper titles distributed	↔/↑	↔	↔	↑	↔	↔
Overall circulation of the international/foreign newspaper titles distributed	↔	↔	↔	↑	↔	no data
Sales volumes of inter-national/foreign newspaper titles distributed	↔	↔	↔	↑	↑	no data

↑ = increase, ↔/↑ = slight increase, ↔ = stable, ↔/↓ = slight decrease, ↓ = decrease

Weekly titles - Development of the number of titles, overall circulation and sales 2003

(figures reported by regional distributors)

Report 2003	Europe	North America	Middle East	Asia Pacific	Africa	Latin America
Number of international/foreign newspaper titles distributed	↔/↑	↔	↔	↑	↑	↔/↑
Overall circulation of the international/foreign newspaper titles distributed	↔/↑	↔	↓	↔/↑	↔/↑	↔
Sales volumes of inter-national/foreign newspaper titles distributed	↑	↔/↓	↔	↔/↑	↑	↔

↑ = increase, ↔/↑ = slight increase, ↔ = stable, ↔/↓ = slight decrease, ↓ = decrease

Titles appearing less than once a week - Development of titles, overall circulation and sales 2003

(figures reported by regional distributors)

Report 2003	Europe	North America	Middle East	Asia Pacific	Africa	Latin America
Number of international/foreign newspaper titles distributed	↔/↑	↔/↑	↔	↔/↑	↔	↔/↑
Overall circulation of the international/foreign newspaper titles distributed	↔	↑	↔	↔/↑	↔	↔
Sales volumes of inter-national/foreign newspaper titles distributed	↔	↔	↑	↔/↑	↑	↔

↑ = increase, ↔/↑ = slight increase, ↔ = stable, ↔/↓ = slight decrease, ↓ = decrease

Press Exports 2002-2004 - Reports and Forecast

Development of press exports to the different target areas (figures reported by publishers and exporters who export to the respective areas)

Report 2002 Report 2003	Europe		North America		Middle East		Asia Pacific		Africa		Latin America	
	2	3	2	3	2	3	2	3	2	3	2	3
Sales volumes of titles exported into the different regions (publishers report)	↑	↔	↓	↔	no data	↔	↔	↔	↔	↔/↓	↓	↔/↓
Sales volumes of titles exported into the different regions (exporters report)	↑	↔	↔	↔	no data	↔	↔	↔	↔	↔	↓	↔/↓

↑ = increase, ↔/↑ = slight increase, ↔ = stable, ↔/↓ = slight decrease, ↓ = decrease



Expected press exports to the different target areas for 2004 (figures reported by publishers and exporters who export to the respective areas)

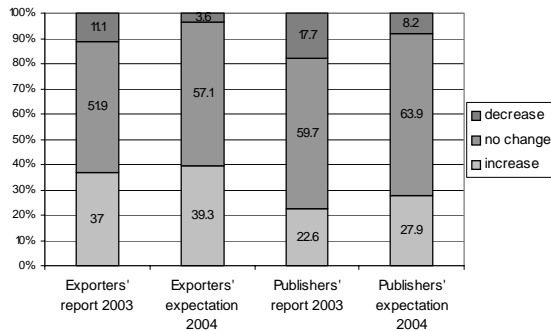
Expectations 2004	Europe	North America	Middle East	Asia Pacific	Africa	Latin America
Sales volumes of titles exported into the different regions (publishers report)	↑	↔/↑	↔	↔	↔/↑	↔
Sales volumes of titles exported into the different regions (exporters report)	↔/↑	↑	↔	↑	↔/↑	↔

↑ = increase, ↔/↑ = slight increase, ↔ = stable, ↔/↓ = slight decrease, ↓ = decrease

Countries Supplied by International/Foreign Publications

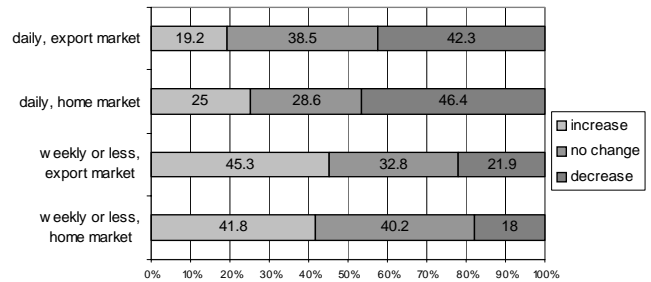
Trend regarding the number of countries supplied. Report 2003 and forecast 2004

(figures reported by publishers and exporters who export to the respective areas)



Total Circulation Development 2003

Development of export markets and home markets of (exported) publications 2003 (figures supplied by publishers)



daily = titles published daily

weekly or less = titles published once per week or less

About Distripres

Distripres is the Association of the International Press Distribution Industry and has over 450 member companies (publishers, distribution companies, suppliers) from close to 100 countries. Each year, the association consults its members about the current state of business and future prospects for cross-border press distribution.

About the Study

In December 2003, a total of 434 questionnaires were sent out to Distripres members. 161 were returned, from 67 publishing houses (53 in Europe and 14 in North America), 91 distribution companies (48 in Europe, 16 in Asia, 9 in North America, and 6 representatives each from the Middle East, Africa and Latin America) and 31 export companies (19 in Europe, 6 in North America, 4 in Asia, 2 in Latin America). 28 companies answered in both the distribution firm and the export company categories.

The study was carried out by Raphael Golta, Distripres/Dr. Josef Trappel & Jan Flückiger, University of Zurich.

This is merely an extract from the study. A detailed version will be appearing in the Distripres Gazette (Information: info@distripres.ch).

CHAPTER TWO



COUNTRY REPORTS

General economic situation

GDP total US\$19 billion; GDP per capita US\$660 (purchasing power parity; 2002). Consumer price index not available.

Performance of newspapers vs. Other media

There are 265 dailies, weeklies and other publications in Afghanistan. Some 150 regular publications are distributed in the capital, Kabul. Bakhtar State News Agency is the pre-eminent source of news in Afghanistan. Only an estimated 37% of Afghans have access to local radio broadcasts. This figure does not take into account the percentage of those who do not own a radio, gender differences in listenership, or limited programming by the local stations. A dozen international stations broadcast in Dari and Pashto.

Newspaper launches/closures

In 2002, authorities have granted more than 100 licences to independent publications, although some regional warlords have refused to allow independent media outlets to operate in the areas under their control. In January 2002, the independent publication Kabul Weekly started publishing after a suspension of five years. The popular state-run daily *Arman-e-Mili* (National Will) with circulation more than 4,000 was shut down in October. A private weekly *Aftab* was banned by the Supreme Court for allegedly publishing blasphemous articles about Islam and its holy book, the Koran.

Readership

Literacy is estimated to be as low as 20%.

Ownership

The state owns at least 35 of the total 150 regular publications

and almost all of the electronic news media. The government controls five major newspapers, including the banned *Arman-e-Mili*. Privatizing at least three of the remaining four has been foreshadowed by culture minister. There are over 85 independent publications in Afghanistan. Kabul TV and radio is officially controlled by the Ministry of Information and Culture. In Herat and most of western Afghanistan, Mohammad Ismail Khan controls most of the media; in most of northern Afghanistan it is General Abdul Rashid Dostum. Some newspapers are directly financed by Afghanistan's neighbors, mainly Iran and Pakistan. Foreign ownership of TV stations and newspapers is prohibited under the new press law.

Media/press laws

A new press law adopted in February 2002 guaranteed the right to press freedom, but also contained a number of broadly worded restrictions on licensing, foreign ownership, and insult laws. One clause bans coverage of subjects that could 'offend Islam,' 'dishonor the people' or 'weaken the army of Afghanistan.' Only citizens of Afghanistan may print publications.

State Support

Government spends 25 US cents (13 afghanis) on each copy of papers it owns and sells it for three afghanis.

Employment

There are fewer than a thousand journalists working in Afghanistan.

Sources: Radio Free Europe – Radio Liberty; Freedom House; UNESCO; BBC; AP; US State Department; Internews; AFP

POPULATION & MORE FACTS

Population by age and sex

	All individuals		Male		Female	
	000	%	000	%	000	%
0-14	11,992	42	6,124	41	5,868	42
15-64	15,912	55	8,241	56	7,671	55
65+	814	3	428	3	386	3
Total	28,718	100	14,793	100	13,925	100

Source: CIA – The World Factbook 2003

Top dailies (2003)

Title	Publisher	Circulation (000)
Hewad	Government (in Pashto language)	8
Anis	Government	5
Kabul Times	Government (in English)	-
Shari'at	-	-

Source: WAN from public sources

General economic situation

GDP total US\$15.69 billion; GDP per capita US\$4,380 (purchasing power parity; 2002). Consumer price index 106 (2002).

Performance of newspapers vs. other media

Local media were booming in 2002. Five new TV stations were established, including one cable operator. Thus 18 TV stations were broadcasting in the capital of Tirana, 39 local stations in the country and there were six cable channels. Six new radio stations started broadcasting and two stopped. Out of a total of 34 radio stations, three were national, 12 broadcast in Tirana and 19 were local radio stations. Nearly all broadcast media are privately owned. In 2002, 95 newspapers and 75 magazines were published in the country.

Performance of different types of newspapers

The number of daily newspapers is relatively high and continues to increase. Four of the total 19 dailies are specialized newspapers. No daily is published outside the capital of Tirana. A considerable increase in the number of local papers is obvious.

Newspaper launches /closures

Out of 12 newspapers launched in 2002, nine were local, mainly in the south. Five newspapers stopped publishing in 2002: *Ta Nea Tis Omonias*, *Blllof Futboll*, *Dardania*, *Myzeqeja*, and *Futbolli Shqiptar*. *Biznes* daily was launched in 2003. It is a full-colour 16-pages A3 publication owned by Spekter, which also publishes two other dailies and a weekly magazine.

Advertising

The New Democratic Party (NDP) was preparing a draft law

on regulation of ads distribution by public organizations or state-owned companies in print and electronic media.

Circulation

Many newspapers do not have any information on the number of their subscribers due to a weak and unclear subscription system in the country. At least two newspapers were published in Greek in the south of Albania in 2002, and 15 Greek papers and magazines were distributed throughout the south, all with very small circulation figures.

Copyright

October 15 was the final deadline for the electronic media outlets to start respecting the copyright of the programs they broadcast. Starting from this date the National Council of Radios and Televisions has started to fine the media outlets, which did not comply with the law. Six TV stations were fined with the minimal fee, mainly Tirana-based ones.

Employment

The prevailing age category of media employees is 18 to 24 years. A third of the editorial staff in all media majored in Albanian language and literature and 12% in journalism. The share of male employees in print media continues to grow. On the other hand, the female employees share in radio and TV is slightly higher. Over 70% of journalists work without contracts. A large part of media operating in Tirana have not fulfilled their obligations with the insurance company of their employees for 2002, and many of them did not renew insurance contracts for 2003.

Sources: CIA – World Factbook 2003; Albanian Media Institute; Freedom House; International Press Institute; US State Department

POPULATION & MORE FACTS

Population by age and sex

	All individuals		Male		Female	
	000	%	000	%	000	%
0-14	1,008	28	521	30	487	27
15-64	2,312	65	1,116	64	1,196	65
65+	262	7	116	7	146	8
Total	3,582	100	1,753	100	1,829	100

Source: CIA - The World Factbook 2003

Employment & salary

	2001	2002
Total no. of Journalists	543	305
Total no. of Employees	842	827

Source: Albanian Media Institute

Cover prices

	Lek (ALL)
Single copy	30

Source: Albanian Media Institute

	2001	2002	Change (%) 2001/2002
Number of titles			
Total dailies	16	18	13
Non-dailies	79	77	-3

Source: Albanian Media Institute

Top dailies (2003)*

Title	Publisher	Format
Albania	Ylli Rakipi	A3
Albanian Daily News	Tribuna Ekonomike Shqiptare e Pavarur	A4
Ballkan	Ferrano Group	A3
Biznes	Sh. a. Spekter	A3
Dita	Dita Group sh. a.	A3
Ekonomia	Enti botues 'Ekonomia'	A3
Gazeta 55	Fahri Balliu	A3
Gazeta Shqiptare	Edisud sh. p. a.	A3
Koha Jone	Nikolle Lesi	A3
Korrieri	Media 6	A3
Panorama	Panorama group	A3
Republika	Partia Republikane e Shqiperise	A3
Rilindja Demokratike	Partia Demokratike	A3
Shekulli	Sh. a. Spekter	A3
Sot		A3
Sport Ekspres	Nikolle Lesi	A3
Sporti Shqiptar	Sh. a. Spekter	A3
Tema	'Media Enter' sh. p. k.	A3
Zeri i Popullit	Partia Socialiste e Shqiperise	A3

Source: Albanian Media Institute

* All dailies, in alphabetical order

General economic situation

GDP total US\$173.8 billion; GDP per capita US\$5,296 (purchasing power parity; 2002). Consumer price index 103 (2002 est.).

Performance of newspapers vs. other media

Radio and TV remain under government control. There is one state owned TV station, Enterprise Nationale de Television (ENTV), and four national radio stations. It is estimated that more than 60% of households have access to European and Middle Eastern broadcasting via the widely available satellite dishes.

Performance of different types of newspapers

Apart from large national newspapers, there are some regional newspapers, mainly in Algiers, Oran and Constantine; a few more specialist publications such as a sports newspaper and a woman's magazine; and virtually no trade press.

Newspaper launches/closures

The government sent notices to seven national daily newspapers saying the papers would not be printed unless they settle all their debts to the government owned printing houses. Later it decided to suspend *Le Matin*, *Le Soir d'Algerie*, *L'Expression* and *Al Ra'i*. Both *Al Khabar* and *Liberte* resumed publication after they settled their debts. Most dailies turned to their electronic readership.

Advertising

The government controls a large portion of the advertising market and occasionally withholds advertising from newspapers on political grounds. All state-owned companies that wish to place an advertisement in a newspaper have to submit the item to the advertising company, which then decides in which newspapers to place it. The state TV channel, which broadcasts largely in Arabic, carries advertising. The state radio stations do carry advertising which is a recent development. There are a few cinemas in the larger towns, showing advertising slides and filmlets before main films. Facilities such as illuminated signs and advertising on public transport are available but not widely used.

Readership

In general the French language newspapers have a wider

and probably more influential readership than the Arabic ones.

Online/digital publishing

Several newspapers now operate online versions of their publications, including *El Khabar*, *El Moudjahid*, *Ech Chaab*, *El Watan*, *El Youm*, *Liberte*, and *La Tribune*.

Ownership

Two of the more recent satellite TV stations, BRTV and Khalifa TV, are owned by Algerians.

Media/press laws

The Information Code was amended in 1998 to allow for private broadcasting but no licenses have yet been granted. The government lifted its ban on satellite dishes in 1987 and has done nothing to try to limit access to satellite TV and radio from abroad. The penal code gives the government authority to impose high fines and jail sentences of up to two years in cases in which journalists 'defame, insult, or injure' government officials or institutions.

Taxes

Tariffs on the importation of foreign publications were raised from 5% to 15%, so that total charges now amount to more than 25% of the cover price.

State Support

Algerian government owns the four primary printing presses used by the print media, and it controls the importation of newsprint. Most independent newspapers rely on the state for printing and paper imports. In 2001, *El Watan* and *Al-Khabbar* dailies began to print in a privately run printing plant with privately obtained newsprint. This ended the government's monopoly.

Employment

Approximately 2,200 journalists work for the media in Algeria, half of them for governmental news organizations and half for the private newspapers. The main union of Algerian journalists, the Syndicat national des journalistes (SNJ), has 450 members.

Sources: Freedom House ; Stanhope Centre UK ; Trade Partners UK ; CIA - The World Factbook 2003

POPULATION & MORE FACTS

Population by age and sex

	All individuals		Male		Female	
	000	%	000	%	000	%
0-14	10,770	33	5,485	33	5,285	33
15-64	20,685	63	10,461	63	10,224	63
65+	1,363	4	625	4	738	5
Total	32,818	100	16,571	100	16,247	100

Source: CIA - The World Factbook 2003

Top ten dailies (2003)

Title	Language	Circulation (000)	Full page rate (dinars)	
			Mono	
Le Matin	(in French)	-	-	-
El Watan	(in French)	100	-	-
Liberte	(in French)	-	-	-
Le Soir d'Algerie	(in French)	-	-	-
L'Expression	(in French)	-	-	-
El Khabar	(in Arabic)	-	-	-
La Tribune	(in French)	-	-	-
El Moudjahid	(in French)	-	-	-
La Nouvelle Republique	(in French)	-	-	43290*
El Massaa	(in Arabic)	-	-	-

Source: WAN from public sources

* Including VAT

ANDORRA

General economic situation

GDP total US\$1.3 billion; GDP per capita US\$18,840 (purchasing power parity; 2002). Consumer price index 104.3 (2000).

Performance of newspapers vs. other media

Andorra has two radio stations, one state-owned and one privately owned, and six TV stations. Citizens can receive

broadcasts from neighbouring France and Spain.

Performance of different types of newspapers

There are two independent daily newspapers and several weeklies in Andorra.

Source: CIA – *The World Factbook 2003* ; WAN from public sources

POPULATION & MORE FACTS

Population by age and sex

	All individuals		Male		Female	
	000	%	000	%	000	%
0-14	11	16	6	17	5	15
15-64	49	71	26	72	23	70
65+	9	13	4	11	5	15
Total	69	100	36	100	33	100

Source: CIA - *The World Factbook 2003*

Top dailies (2003)

Title	Publisher	Readership (000)
Diari d'Andorra	Prensa Andorrana, SA (in Catalan)	17
El Periodic	Grupo Zeta	

	1999	2000	2001	2002	2003	Change (%)	
						1999/2003	2002/2003
Number of titles							
Total dailies	2	2	2	2	2	0.00	0.00

Source: WAN from public sources

ANGOLA

General economic situation

GDP total US\$18.36 billion; GDP per capita US\$1,705 (purchasing power parity; 2002). Consumer price index 206 (2002).

Performance of different types of newspapers

There is one national daily newspaper and some regional newspapers published in several towns. There are seven private weekly newspapers. Four of them – *Agora*, *Folha 8*, *Angolense* and *Actual* – usually print, altogether, an average of 20,000 copies a week.

Newspaper launches /closures

A monthly business newspaper (*Palanca News and Business*), has been launched with the initial circulation of 15,000 copies. It is distributed in 70% of the country area and also in South Africa.

Circulation

Newspapers are sold at an average of 80 US cents per copy in the streets ; the printing press charges up to 40 US cents per printed copy.

Ownership

State owns the only daily newspaper in the country ; the only TV station, Televisao Popular de Angola (TPA), the only radio station that broadcasts in FM, MW and SW, Radion nacional de Angola (RNA), and the only news agency in the country, Angop. Brazilian editors and other specialists master the editorial contents of these media outlets. There were also five commercial radio stations, including Catholic-run Radio Ecclesia and Radio Lac Luanda.

Media/press laws

Defamation of the president or his representatives is a criminal offence punishable by imprisonments or fines.

Employment

The state media employ over 80% of the full time journalists in the country. On average, a state media journalist earns the equivalent of US\$50 a month and, as a perk, has the right to a food ration card to spend up to US\$100 in a shop chosen by the authorities.

Sources: *Freedom House* ; *Inter-Church Coalition on Africa* ; *BBC* ; *AngolaPress* ; *US State Department*

POPULATION & MORE FACTS

Population by age and sex

	All individuals		Male		Female	
	000	%	000	%	000	%
0-14	4,682	43	2,364	43	2,318	44
15-64	5,785	54	2,942	54	2,843	53
65+	300	3	134	2	166	3
Total	10,767	100	5,440	100	5,327	100

Source: CIA - *The World Factbook 2003*

Top dailies (2003)

Title	Publisher	Circulation (000)
Jornal de Angola	Government	41

Source: WAN from public sources

General economic situation

GDP total US\$104 million; GDP per capita US\$8,000 (purchasing power parity; 2002). Consumer price index 102.3 (2002).

Performance of newspapers vs. other media

There are 37 cable TVs available in the country.

Performance of different types of newspapers

There are two weekly newspapers, the Anguillian and the Light.

Sources: CIA - The World Factbook 2003 ; Commonwealth Press Union ; WAN from public sources

POPULATION & MORE FACTS

Population by age and sex

	All individuals		Male		Female	
	000	%	000	%	000	%
0-14	2	15	1	14	1	17
15-64	9	69	5	71	4	67
65+	2	15	1	14	1	17
Total	13	100	7	100	6	100

Source: CIA - The World Factbook 2003

	2002
Number of titles	
Non-dailies	2

Source: Commonwealth Press Union; WAN from public sources

ANTIGUA & BARBUDA

General economic situation

GDP total US\$750 million; GDP per capita US\$ (purchasing power parity; 2002). Consumer price index 100.4 (2000 est.).

Performance of different types of newspapers

The three major newspapers are the *Daily Observer* and the *Antigua Sun*, which are dailies and *Outlet* which is a weekly. All three are privately owned. The two dailies take opposing views. The *Daily Observer* is seen as anti-government while the *Sun* is seen as the opposite. *Outlet* used to be fiercely anti-government and specialised in investigative reporting. However, earlier in 2002 there has been an alteration of viewpoint.

Ownership

Media ownership remains highly concentrated and economically dependent on the ruling Antigua Labor Party and the Bird family. The government owns one of the three general interest radio stations and the single TV station. One of the prime minister's brothers owns the second radio station, and another brother is the principal owner of the sole cable TV company. The country's first independent broadcast media, the *Observer* radio station, became operational in 2001, operated by the owners of the *Observer* newspaper.

Sources: CIA - The World Factbook 2003; US State Department; Freedom House; Commonwealth Press Union

POPULATION & MORE FACTS

Population by age and sex

	All individuals		Male		Female	
	000	%	000	%	000	%
0-14	19	28	10	29	9	26
15-64	46	68	23	68	23	68
65+	3	4	1	3	2	6
Total	68	100	34	100	34	100

Source: CIA - The World Factbook 2003

Top dailies (2003)

Title	Publisher	Cover Price	
		East Carribean Dollar	US\$
Daily Observer	Observer Group	2.00	0.74
Antigua Sun	Sun Printing & Publishing Ltd.	-	-

ARGENTINA

The following information has not been updated since the 2001 edition of World Press Trends, due to a lack of available data.

POPULATION

Population by age and sex (2001)

	All individuals		Male		Female		Households 000
	000	%	000	%	000	%	
0-15	10,265	28	5,215	29	5,050	27	9,781
16-24	6,658	18	3,367	19	3,291	17	
25-34	5,283	14	2,655	15	2,628	14	
35-44	4,497	12	2,217	12	2,280	12	
45-54	3,846	10	1,871	10	1,975	10	
55-64	2,890	8	1,367	8	1,523	8	
65+	3,592	10	1,473	8	2,120	11	
Total	37,032	100	18,163	100	18,868	100	

Source: CEPAL

Population by social class and sex

	All individuals		Male		Female	
	000	%	000	%	000	%
AB	235	1	113	1	122	1
C1	2,347	10	1,128	10	1,219	10
C2	2,582	11	1,241	11	1,341	11
C3	5,633	24	2,707	24	2,926	24
D	11,736	50	5,640	50	6,096	50
E	939	4	451	4	488	4
Total	23,472	100	11,280	100	12,192	100

Source: AAM

AB = higher and intermediate managerial

C1 = supervisory/clerical

C2 = intermediate employee/skilled manual

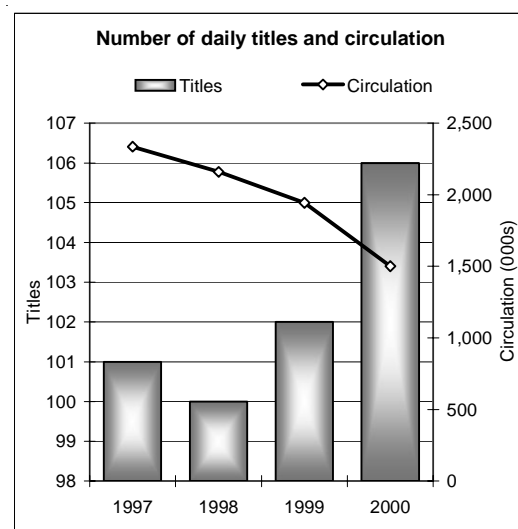
C3 = low-status employee

D = semi and unskilled manual

E = subsistence/inactive

NUMBER OF TITLES AND CIRCULATION

	1997	1998	1999	2000	2001	Change (%)	
						97/2000	99/2000
Number of titles							
Total dailies	101	100	102	106	-	4.95	3.92
National	-	-	-	9	-	-	-
Regional	-	-	-	97	-	-	-
Free papers	-	-	1	3	-	-	200.00
Circulation (000)							
Total dailies	2,335	2,160	1,944	1,500	-	-35.76	-22.84
National	-	-	-	900	-	-	-
Regional	-	-	-	600	-	-	-
Free papers	-	-	180	700	-	-	288.89
Total annual sales (millions of copies)							
Dailies	840	778	700	550	-	-34.52	-21.43
Free papers	-	-	65	185	-	-	184.62

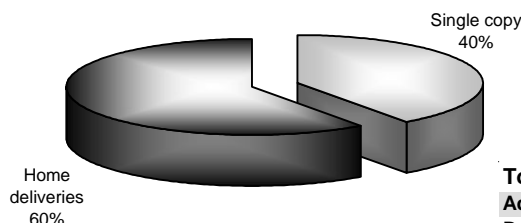


MORE FACTS

Type of newspaper sales (%)

	Single copy	Home deliveries
1997	40	60
1998	40	60
1999	40	60
2000	40	60

Type of newspaper sales in 2000 (%)



Internet publishing (No. of online editions)

	1997	1998	1999	2000
Dailies	10	34	49	100

Online readership (page hits 000)

Newspaper	1997	1998	1999
Clarín	1,000	1,950	2,550
La Nación	-	510	900
Olé	-	450	600

Top publishing companies (2002)

(ranked by advertising revenue)

Grupo Clarín
La Nación
Ambito Financiero
Página 12
La Prensa
El Cronista

Source: MONITOR

Top advertising categories (2001)

Advertising sector	Expenditure (Peso 000s)
Retail	175,564
Media	136,101
Communications	56,542
Banks	52,949
Politics	52,898
Auto	52,632
Tourism	37,763
Education	29,332
Finance/insurance	28,503

Source: MONITOR



Top ten advertisers (2001)

Advertiser	Expenditure (Peso 000s)
Cencosud	34,233
Editorial AGEA	23,690
Coto C.I.C.S.A	16,570
Garbarino	13,754
Prima	12,907
Fravega S.A.C.I.E.I.	11,913
The Home Depot	11,816
Disco	11,226
Telecom ARG-STET-France	11,014
Artear	10,822

Source: MONITOR

Top ten dailies (2002)

Title	Publisher	Circulation (000)	Readership (000)	Format	Full page rate (Peso)	
					Mono	Colour
Clarín	AGEA SA	456	3,241	Tabloid	21,804	29,808
Crónica	Editorial Sarmiento	225	493	Tabloid	13,653	16,384
La Nación	La Nación Group	167	627	Broadsheet	33,973	39,968
La Razón	Editorial La Razón	163	161	-	20,660	24,792
Ambito Financiero	AmFin SA	110	182	Tabloid	9,700	12,125
Diario Popular	Imbrepá	81	381	Tabloid	10,500	13,125
Cronista Comercial	Editorial El Cronista	60	-	-	16,720	21,550
La Voz del Interior	La Voz de Interior SA	58	339	Broadsheet	17,172	20,606
Ole	-	51	190	-	9,747	11,628
La Gaceta	La Gaceta SA	44	188	Broadsheet	15,100	16,610

Source: IVC, TGI, ZenithOptimedia

ADVERTISING EXPENDITURE & ECONOMIC DATA

Advertising expenditure

(US\$ million, in current prices)

	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
Newspapers	1,256	1,460	1,580	1,091	654	808	613	674	741	852	980
Magazines	225	263	292	306	331	271	77	85	94	108	124
Television	1,148	1,291	1,260	1,371	1,182	1,051	647				
Radio	227	220	215	204	231	226	68				
Cinema	52	50	49	54	48	44	26				
Outdoor	178	193	207	204	228	168	101				
Internet	0	0	0	0	0	0	11				
Total	3,086	3,476	3,603	3,231	2,674	2,568	1,543	1,698	1,868	2,147	2,469

Source: 1996-2002 AAM, 2003-2006 ZenithOptimedia

Notes: Excludes production costs and classified, after discounts, includes agency commission at 17.65% (1993-97) or 15% (1998-2004), newspaper measurement changed in 1999

Main economic indicators 1996-2002

	1996	1997	1998	1999	2000	2001	2002
1 US\$= 3.06 Peso at 2002 rate							
Gross Domestic Product (Peso billion)							
at current prices	272	293	299	284	284	269	313
% change	5.5	7.6	2.1	-5.2	0.2	-5.5	16.5
at 2002 prices	336	360	365	350	354	338	313
% change	32.5	7.1	1.2	-4.0	1.1	-4.4	-7.5
Gross Domestic Product per capita (Peso 000)							
at current prices	7.7	8.2	8.3	7.8	7.7	7.4	8.6
at 2002 prices	9.6	10.1	10.1	9.6	9.6	9.3	8.6
Population							
Millions	35.2	35.7	36.1	36.6	37.0	36.2	36.2
Consumer Price Index							
2002=100	80.9	81.3	82.0	81.0	80.3	79.4	100.0
% change	0.2	0.5	0.9	0.9	-0.9	-1.1	25.9
Ad.spend as a % of GDP							
	1.13	1.19	1.21	1.14	0.94	0.96	0.49
Advertising Expenditure Growth (%)							
at current prices	6.5	12.6	3.7	-10.3	-17.2	-4.0	-39.9

Source: IFS, ZenithOptimedia

Taxes

VAT on: sales 0 advertising 21%
 newsprint 21% plant 21%
 composition 21% (standard VAT rate 21%)

There is a 30% tax on profit. VAT is deductible from other taxes

Subsidies

There are no credit facilities or special loans for media companies. Equipment purchase relief, lower interest rates or credit may only be obtained by participating in programmes or promotion plans in other economic sectors.

Discounts

or: post 0 rail 0 telephone 0 telegraph 0 telex 0

Ownership

Does any law exist governing publishing-house ownership, or the registration of shares in newspaper-publishing companies? No

Is there any law prohibiting or restricting foreign companies or individuals from owning shares, and in particular, the majority of shares, of domestic daily newspapers? No

Is there any law prohibiting daily newspaper or periodical publishers from operating radio or television stations in the same locality? No

So as to guarantee disclosure and transparency in the capital structure and to avert silent partnerships, is there a law or rule making it possible to determine who actually owns a publishing company? No. However, every year all joint-stock companies are required to present balance sheets and books containing the names, occupations and identity card numbers of their shareholders. Limited-liability companies are not required to present their balance sheets.

Is there an antitrust law limiting concentration in the daily press? No

Is further regulation of media concentration expected? No

Commentary - IREX/ProMedia

The Armenian news media are moving towards true financial independence, but they are moving slowly. Progress is hindered by four factors:

First, the general economy of Armenia, while improving, still does not function like a typical market economy. Advertisers see little need to advertise because most have few rivals to worry about.

Second, there is no tradition of advertising and newspapers are extremely politicised. Unfortunately, advertising in a publication is considered a political decision, not a business decision.

Third, television advertising is very cheap compared to newspaper advertising, while offering a much wider reach.

Fourth, what can be characterised as the force of inertia, which is a deeply rooted cultural resistance to change.

Distribution

The distribution system on which all newspapers used to depend, Hymamul, has finally been privatised – a process that was delayed for two years by political interference provoked by newspaper editors. The break-up of Haymamul has created eight new companies specialising in newspaper distribution on a small scale. It appears that market forces are at work and private businesses are moving to meet the need.

However, most newspapers still depend on the state-owned distribution system, which consists of more than 200 kiosks. The best kiosks have been sold to private operators, which now sell cigarettes and other items as well as newspapers. Most editors are now seeking alternatives. Under the privatisation scheme kiosks are required to sell newspapers for five years, but many editors fear the kiosk may stop selling newspapers after only a year.

Future

Much work must be done before the print media in Armenia can be considered independent. Most newspapers continue to receive from 20% to 40% of their revenue from backers and sponsors, though the proportion is dwindling. The amount of money and the source varies month-to-month and newspaper to newspaper. Newspapers earn most of their income – an average of about 60% – from the sale of their newspapers in kiosks and subscriptions, which is why distribution is a critical element to the financial success of newspapers.

Most Armenian merchants view advertising as a drain on their resources, not an investment. They do not think in terms of competition in a free market economy. The economic conditions do not require businesses to advertise and market themselves in order to gain market share. Moreover, advertising in one publication or another carries with it a political stigma. Since most newspapers have a political slant or party affiliation, the placement of an ad in a publication is interpreted as financial support for that political point of view.

POPULATION

Population by age and sex (2002)

	All individuals		Male		Female	
	000	%	000	%	000	%
Children	966	26	499	27	467	25
16-24	665	18	339	18	326	18
25-34	566	15	279	15	287	16
35-44	626	17	294	16	332	18
45-54	245	7	161	9	85	5
55-64	295	8	133	7	162	9
65+	331	9	138	8	193	10
Total	3,694	100	1,844	100	1,850	100

Source: Armenian Sociological Association

Age structure of readership (2002)

Age	% of readership
18-29	24
30-44	29
45-59	36
60+	11

Population by social class and sex (2002)

	All individuals	
	000	%
A+B	868	23
C	249	7
D	2,577	70
Total	3,694	100

Source: Armenian Sociological Association

A = executive/managers/administrators

B = professional/managers

C = skilled manual workers

D = state pensioners/widows/children

Newspaper reach (%) (2002)

All adults	Daily	Weekly	Monthly
	14	16	22

MORE FACTS

Newsprint costs

	2002
As % of average cover price *	
Single copy sales	25-30
Postal deliveries	45
Newsprint costs (average per ton)	
Dram	472,000
Euros	743

* Figures include dailies and non-dailies

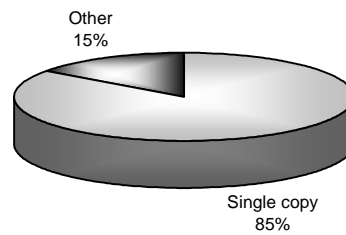
	2002
Advertising revenues (Dram million)	
Dailies	30.2
Non-dailies	54.2
Sales revenues (Dram million)	
Dailies	600
Non-dailies	300



Type of newspaper sales (%)

	Single copy	Other
2001	90	10
2002	85	15

Type of newspaper sales in 2002 (%)



Cover prices (dailies - 2002)

	Dram
Single copy	50-100
Subscription	125

Internet publishing (No. of online editions)

	2002
Dailies	5
Non-dailies	3

Newspaper colour capability & formats

Number of:	2002
Broadsheets	1
Tabloids	5

Top dailies (2002)

Title	Publisher	Circulation	Cover price		Format	Full page rate (Dram)	
			(Dram)	US\$		Mono	Colour
Hayastani Hanrapetutyun	Hanrapetutyun CJSC	6,000	100	0.26	Broadsheet	150-200	-
Azg	Azg Daily	5,000	100	0.26	Tabloid	200	-
Aravot	Aravot Daily	5,000	100	0.26	Tabloid	200	285-300
Haykakan Zhamanak	Dareskizb	4,500	100	0.26	Tabloid	-	-
Hayots Ashkhar	Hayots Ashkhar Daily	3,500	100	0.26	Ttabloid	180-200	-
Orran	Lokus Standi	3,000	50	0.13	Tabloid	-	-

Top ten advertising categories (2002)

Advertising sector	Expenditure (%)
Bank services and reports	30.0
Property	25.0
Airlines and travel agencies	20.0
Cosmetics and beauty salons	7.0
Alcohol and cigarettes	5.0
Computers and accessories	5.0
Classified	4.8
Training and education	3.0
Stores and boutiques	0.1
Restaurants, bars and hotels	0.1

Top publishing companies (2002)

Tigran Mets
Gind
H.Simikyan
Grigor Tatevatsi
Voskan Yerevantsi

Top ten advertisers (2002)

Advertiser	Total expenditure (Dram)
SIL Group	7,000,000
Armavia	6,600,000
Grand Candy	3,000,000
Multi Group	2,000,000
Jermuk	1,500,000
Vedi Alco	700,000
Cigaronne	400,000
Grand Tobacco	300,000
Kilikia Beer	200,000
Avshar	200,000

Source: informal survey of newspaper ad sales departments

NUMBER OF TITLES AND CIRCULATION

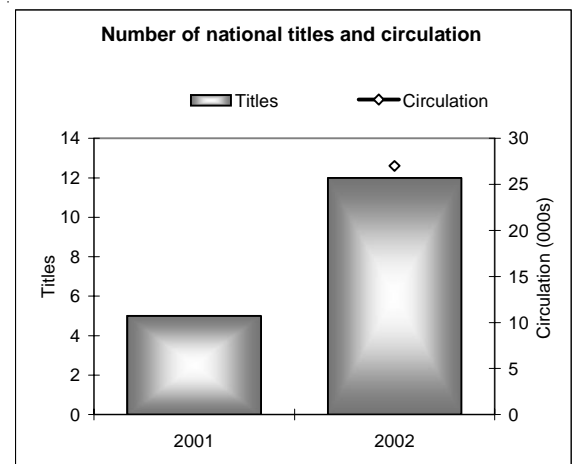
	2001	2002	Change (%) 2001/02
Number of titles			
Total dailies	5	12	140.00
National dailies	5	6	20.00
Local dailies	-	6	-
Non-dailies	40	41	2.50
National non-dailies	11	12	9.09
Regional non-dailies	29	29	0.00
Circulation (000)			
Total dailies	-	27	-
National dailies	-	27	-
Regional dailies	-	-	-
Non-dailies	-	116	-
National non-dailies	-	-	-
Regional non-dailies	-	116	-

Note 1: There are no free and Sunday newspapers in Armenia.

Note 2: There are no daily or community newspapers in Armenian regions.

Note 3: National newspapers are defined as those which are published in Yerevan and distributed throughout the country.

Note 4: Regional newspaper are defined as those publications distributed through certain regions.





Taxes

VAT on: sales 20% advertising 20%
 newsprint 20% plant 20%
 composition 20% (standard VAT rate 20%)

There is a 20% tax on advertising.
 Newspaper profits are taxed 20%.

ARUBA

General economic situation

GDP total US\$ 1.94 billion; GDP per capita US\$27,323
 (purchasing power parity; 2002). Consumer price index 103.2
 (2002 est.).

Source: CIA - The World Factbook 2003

POPULATION & MORE FACTS

Population by age and sex

	All individuals		Male		Female	
	000	%	000	%	000	%
0-14	15	21	8	24	7	19
15-64	48	68	23	68	25	68
65+	8	11	3	9	5	14
Total	71	100	34	100	37	100

Source: CIA - The World Factbook 2003

Top dailies (2003)

Title	Publisher	Full page rate (Aruban guilder/florin)	
		Mono	Colour
Diario*	-	401	1,251
Bon Dia Aruba *	Sociedad Interamericana di Prensa	-	-
La Prensa*	-	-	-
Amigoe**	-	-	-

Source: WAN from public sources

* in Papiamentu, Aruba's local language

** in Dutch, an edition from the Netherlands Antilles

POPULATION

Population by age and sex (2001)

	All individuals		Male		Female		Households 000
	000	%	000	%	000	%	
Children	3,913	21	2,008	22	1,905	20	7,017
15-24	2,566	14	1,306	14	1,260	13	
25-44	5,591	30	2,749	30	2,842	30	
45-64	4,329	23	2,161	23	2,168	23	
65+	2,371	13	1,043	11	1,328	14	
Total	18,770	100	9,267	100	9,503	100	

Source: Australian Bureau of Statistics census 2001

Population by social class and sex

	All adults		Male		Female	
	000	%	000	%	000	%
AB	3,225		1,819		1,406	
C	3,235		1,570		1,665	
D	3,225		1,556		1,669	
E	3,224		1,562		1,662	
FG	3,225		1,450		1,775	
Total	16,134		7,957		8,177	

Source: Roy Morgan Research December 2003

AB = professionals, 75% have degree/diploma, 59% have household income over A\$50,000

C = 3 out of 10 are white-collar workers, 20% have incomes of over A\$50,000, most have tertiary education

D = skilled and semi-skilled trades people, with middle range incomes

E = 67% left school before year 12, less than half are employed

FG = 12% are semi or unskilled workers, 75% are not employed.

Age structure of readership

Age	% of readership	% monthly reach within age group
less than 18	5.9	59.8
18-24	12.2	68.6
25-34	17.8	69.9
35-44	17.6	72.4
45-54	18.7	75.5
55-64	13.0	76.1
65+	14.9	73.4

Source: Roy Morgan Research December 2003

Newspaper reach (%)*

Daily	
All adults	71.8
Men	74.0
Women	69.7
MHS	71.0

Source: Roy Morgan Research December 2003

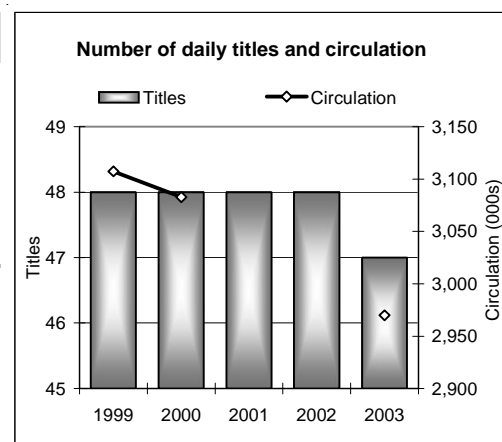
* reach among people who read daily newspapers

MHS = Main Household Shopper

NUMBER OF TITLES AND CIRCULATION

	1999	2000	2001	2002	2003	Change (%)	
						99/2003	2002/03
Number of titles							
Total dailies	48	48	48	48	47	-2.08	-2.08
City dailies	10	10	-	11	10	0.00	-9.09
National dailies	2	2	-	2	2	0.00	0.00
Regional dailies	36	36	-	35	35	-2.78	0.00
Regional non-dailies	96	97	-	95	117	21.88	23.16
City Sundays	10	10	-	11	10	0.00	-9.09
Free papers	243	247	-	-	257	5.76	-
Circulation (000)							
Total dailies	3,107	3,083	-	-	2,970	-4.42	-
City dailies	2,270	2,240	-	-	2,159	-4.90	-
National dailies	251	253	-	-	289	15.12	-
Regional dailies	586	590	-	-	522	-10.93	-
Regional non-dailies	385	381	-	-	456	18.48	-
City Sundays	3,441	3,416	-	-	3,461	0.57	-
Free papers	9,947	10,332	-	-	10,419	4.74	-
Total annual sales (millions of copies)							
Total dailies	942.8	930.3	-	-	950	0.76	-
City & national dailies	789.7	777.5	-	-	788	-0.22	-
City dailies	-	-	-	-	685	-	-
National dailies	-	-	-	-	103	-	-
Regional dailies	153.1	152.8	-	-	162	5.81	-
Regional non-dailies	31.5	30.7	-	-	32	1.59	-
City Sundays	179.0	177.6	-	-	180	0.56	-
Free papers	-	-	-	-	542	-	-

Source: ABC/Circulation Audit Board



MORE FACTS

Contribution of classified, display and insert advertising to total advertising income 2002 (%)

	1997	1998	1999	2000
Display (including inserts)	56.1	53.2	53.6	53.4
Classified	43.9	46.8	46.4	46.6

Source: Commercial Economic Advisory Service of Australia (CEASA)

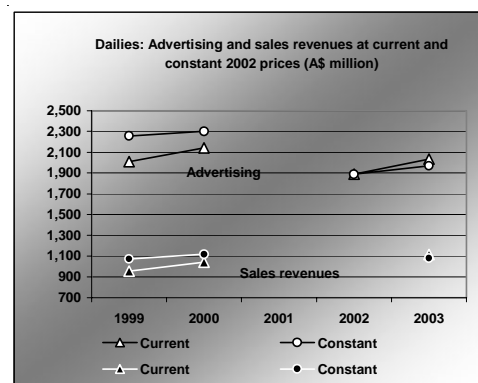
Cover prices

	A\$
Single copy	0.65-2.50

Source: ABC



	1999	2000	2001	2002	2003	Change (%)	
						99/2003	2002/03
Advertising revenues (A\$ million)							
Total dailies	2,012	2,142	-	1,888	2,033	1.05	7.68
<i>City & national dailies</i>	1,636	1,748	-	1,524	1,624	-0.75	6.56
<i>Regional dailies</i>	376	394	-	364	409	8.88	12.36
Total dailies \$	2,258	2,302	-	1,888	1,970	-12.77	4.34
Regional non-dailies	229	233	-	-	243	-	-
City Sundays	309	322	-	-	329	-	-
Free papers	525	661	-	-	646	-	-
Sales revenues (A\$ million)							
Total dailies	956	1,041	-	-	1,116	16.74	-
<i>City & national dailies</i>	796	864	-	-	911	14.45	-
<i>City dailies</i>	-	-	-	-	800	-	-
<i>National dailies</i>	-	-	-	-	111	-	-
<i>Regional dailies</i>	160	177	-	-	205	28.13	-
Total dailies \$	1,073	1,119	-	-	1,081	0.77	-
Regional non-dailies	28	31	-	-	36	29.50	-
City Sundays	228	247	-	-	282	23.47	-



\$ at constant 2002 prices

Source: Advertising Expenditure in Main Media, Commercial Economic Advisory Service of Australia (CEASA). Excludes agency commission, production costs and directories. After discounts.

Distribution and newsprint costs

	1997	1998	1999	2000	2001	2002
As % of average cover price						
Single copy sales	32	32	32	32	-	-
Home deliveries	32	32	32	32	-	-
Newsprint costs (average per ton)						
A\$	926	955	975	947	980	985

Source: ANM/Fletcher Challenge Paper/Norske Skog

Distribution costs vary for different newspapers, and in different areas. The above figures are an estimate of the average cost of delivery to newsagents and agency commission. The newsagency system has now been deregulated. From Feb 2001 each publisher has had to negotiate an individual contract for retail and home delivery - without relying on a governing body or publishers jointly administering the system.

Top ten dailies (2003)

Title	Publisher	Circulation (000)	Readership (000)	Cover price		Format	Full page rate (A\$)	
				A\$	US\$		Mono	Colour
The Herald Sun, Victoria	Herald and Weekly Times	553	1,545	1.00	0.54	Tabloid	28,515	37,070
The Daily Telegraph	Mirror Australia Telegraph Publications	401	1,193	1.00	0.54	Tabloid	24,241	31,513
The Sydney Morning Herald	John Fairfax Publications	222	893	1.20	0.65	Broadsheet	40,958	53,246
The Courier Mail, Queensland	Queensland Newspapers	214	616	1.00	0.54	Broadsheet	21,037	27,349
The West Australian	West Australian Newspapers	202	592	1.00	0.54	Tabloid	9,100	12,080
The Advertiser, South Australia	Advertiser Newspapers	199	579	1.00	0.54	Tabloid	7,634	99,240
The Age, Victoria	John Fairfax Publications	197	688	1.20	0.65	Broadsheet	31,702	41,213
The Australian	Mirror Australia Telegraph Publications	126	442	1.20	0.65	Broadsheet	26,978	35,071
The Australian Financial Review	John Fairfax Publications	88	284	1.50	0.82	Tabloid	14,071	19,571
The Mercury, Tasmania	Davies Bros	47	129	1.00	0.54	Tabloid	3,905	5,077

Source: Readership - Roy Morgan Single Source Australia

Top ten advertising categories (2003)

Advertising sector	Expenditure A\$ (000s)
Retail	480,618
Motor vehicles	206,012
Entertainment & leisure	186,976
Property	155,936
Finance	144,365
Travel/accommodation	142,576
Recruitment	101,601
Communications	75,545
Services	44,520
Government	41,049

Source: AdEx Data

Top publishing companies (2003)

Publisher	Expenditure A\$ (000s)
News Limited	
John Fairfax Publications	
APN News & Media	
Rural Press	
West Australian Newspapers	
Trading Post	

Estimated based on a combination of circulation and advertising revenue.

Top ten advertisers (2003)

Advertiser	Expenditure A\$ (000s)
Coles Myer	60,465
Woolworths	48,258
Harvey Holdings	30,005
Commonwealth government	26,919
Toyota	18,388
General Motors Holden	18,227
New South Wales government	16,933
Mitsubishi	16,857
Victoria government	16,412
Queensland government	14,778

Source: AdEx Data



Online readership (unique visitor reach)

Publisher		2000	2001	2002
The Sydney Morning Herald	www.smh.com.au	6.0	11.6	14.0
News Limited	www.news.com.au	4.6	8.1	14.2
The Age	www.theage.com.au	4.0	7.1	10.0
Australian Financial Review	www.afr.com.au	2.1	1.5	1.5
West Australian Newspapers	www.thewest.com.au	-	0.7	1.0

Source: RedSheriff Ratings

Data is independently audited by RedSheriff

Internet publishing (No. of online editions)

	1999	2000	2001	2002	2003
Editorial on-line					
National & city papers	22	22	-	-	22
Regional papers	100+	150+	-	-	450+
Sundays	-	-	-	-	10
Classified advertising on-line (number of publications)					
National & city papers	22	22	-	-	-
Suburban & trader papers	100+	100+	-	-	-
Regional papers	100+	100+	-	-	-

Source: National Library of Australia

The figures for regional, suburban & trader papers should be regarded as a minimum as it is difficult to monitor all of them accurately.

Newspaper colour capability & formats (2000)

Number of:	1998	1999	2000
4-colour newspapers	48	48	48
Broadsheets	6	6	6
Tabloids	42	42	42

This data is for national, city and regional daily newspapers

CROSS MEDIA OWNERSHIP

Owners	Commercial TV licence	Newspapers	Radio licence
Commercial TV Licensees (based on licence area)		Not a newspaper associated with TV licence area	Not for same licence area
Newspaper owners	Not if TV licence is for area associated with newspaper	No Broadcasting Services Act limits (but Trade Practices Act applies)	Not if radio licence is for area associated with newspaper
Satellite TV Broadcasters	No limit, but must be monitored by Australian Broadcasting Authority	No limit, but must be monitored by Australian Broadcasting Authority	No limit, but must be monitored by Australian Broadcasting Authority
Radio Licensees	Not for same licence area	Not a newspaper associated with radio licence area	Not more than two licences in the same licence area
Foreign Investors	Requires approval of Federal Treasurer	Requires approval of Federal Treasurer - 25% limit for an individual, and 30% in aggregate	Requires approval of Federal Treasurer

This table shows cross media ownership allowed by the Broadcasting Services Act, not including Trade Practices Act issues.

ADVERTISING EXPENDITURE & ECONOMIC DATA

Advertising expenditure

(A\$ million, in current prices)

	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
Newspapers	2,481	2,746	3,011	3,074	3,359	3,131	2,991	3,164	3,307	3,452	3,555
Magazines	574	733	766	796	837	773	789	836	878	918	955
Television	2,084	2,248	2,400	2,454	2,746	2,490	2,666	2,902			
Radio	525	540	557	644	684	695	702	751			
Cinema	41	47	53	58	69	64	58	63			
Outdoor	249	254	274	311	276	271	261	273			
Internet	0	0	0	35	83	61	63	67			
Total	5,954	6,568	7,061	7,372	8,054	7,485	7,530	8,056	8,497	8,921	9,255

Source: 1995-2002 Commercial Economic Advisory Service of Australia, excludes directories 2003-2006 ZenithOptimedia

Notes: Excludes agency commission and production costs, includes classified advertising, after discounts



Main economic indicators 1996-2002

	1996	1997	1998	1999	2000	2001	2002
1 US\$= 1.84 A\$ at 2002 rate							
Gross Domestic Product (A\$ billion)							
at current prices	517	546	577	608	652	694	732
% change	6.7	5.5	5.7	5.4	7.2	6.4	5.5
at 2002 prices	596	627	657	683	701	714	732
% change	4.0	5.2	4.9	3.9	2.6	1.9	2.5
Gross Domestic Product per capita (A\$ 000)							
at current prices	28.3	29.5	30.8	32.1	34.0	35.6	37.6
at 2002 prices	32.6	33.8	35.1	36.0	36.6	36.6	37.6
Population							
Millions	18.3	18.5	18.7	19.0	19.2	19.5	19.5
Consumer Price Index							
2002=100	86.8	87.1	87.7	89.1	93.1	97.1	100.0
% change	2.6	0.3	0.8	1.5	4.5	4.4	3.0
Ad.spend as a % of GDP							
	1.15	1.20	1.22	1.21	1.24	1.08	1.03
Advertising Expenditure Growth (%)							
at current prices	0.7	10.3	7.5	4.4	9.3	-7.1	0.6
at 2002 prices	-1.9	10.0	6.7	2.8	4.6	-11.0	-2.3

Source: IFS, ZenithOptimedia

Research

Circulation is audited by: The Audit Bureau of Circulation publishes circulation figures four times a year for national, metropolitan and regional newspapers, and twice a year for magazines. The Circulation Audit Board (CAB) publishes circulation figures twice a year for trade and speciality publications and for suburban newspapers. CAB figures are released in March and September, each covering six months of circulation.

Readership is measured by: The readership survey conducted by Roy Morgan Research is generally accepted as Australia's readership currency and comprises approximately 55,000 face-to-face interviews conducted during 48 weekends of the year. Newspaper readership is measured using the recent-reading method. Magazine readership is measured using a combination of 'First Time Reading in the Last 7 Days', 'Specific Issue: Using Full Colour Reduced Front Covers' and 'Specific Issue: Full Through-the-Book' methods. Collectively, this approach is known as the composite methodology. Further detailed product and media information is collected via self-completion materials, in the week following the face-to-face interview, among the same pool of respondents. Readership figures are a 12-month average and are released four times a year, based on a rolling 12-month survey period.

Taxes

VAT on: sales 10% advertising 10%
 newsprint 10% composition 10%
 plant 10% (standard VAT rate 10%)

A 10% GST (VAT) was introduced in July 2000 as part of a major reform of the Australian taxation system. There are no special taxes on advertising or bill posting.

Discounts

There are no special reductions on tariffs, and, except for the post, all these services are provided by private companies.

on: post 0 rail 0 telephone 0
 telegraph 0 telex 0

Ownership

Does any law exist governing publishing-house ownership, or the

registration of shares in newspaper-publishing companies? Yes, but only in respect of:

- foreign ownership; and
- cross-media ownership limitations.

Is there any law prohibiting or restricting foreign companies or individuals from owning shares, and in particular, the majority of shares, of domestic daily newspapers? Foreign investment in mass-circulation national, metropolitan, suburban and provincial newspapers is restricted under government policy as well as under the Foreign Acquisitions and Takeovers Act.

Under government policy, all proposals for foreign companies or individuals to acquire 5% or more of a newspaper, or to establish a newspaper, are subject to case-by-case examination by the Federal Treasurer.

In general terms, the current policy sets the following foreign ownership limits:

- for national and metropolitan newspapers, the maximum permitted single foreign stake is 25%, while other unrelated foreign interests can have an additional 5%;
- for provincial and suburban newspapers (which are not usually published daily) foreign interests are limited to less than 50% for non-portfolio shareholdings.

These limits may be exceeded with approval from the Federal Treasurer. Existing foreign interests were allowed to remain in place when this policy was introduced.

Is there any law prohibiting daily newspaper or periodical publishers from operating radio or television stations in the same locality? Yes, there are very complex laws. In summary, a proprietor would not be allowed to own both a major metropolitan newspaper and a free-to-air television station in the same market. If the Australian Broadcasting Authority is satisfied that 50% or more of the circulation of a newspaper is within the same area as a broadcasting licence, then the newspaper will be an associated newspaper of that licence. There are also restrictions on the ownership of pay-TV stations in these markets. The interpretation of markets becomes hazier with national publications, which are evaluated on a state-by-state basis.

So as to guarantee disclosure and transparency in the capital structure and to avert silent partnerships, is there a law or rule making it possible to determine who actually owns a publishing company? In respect of public companies, notification of the acquisition of a substantial shareholding must be made to the Australian Securities Commission (ASC) and the company in which the shares are held. Any person can obtain a search from the ASC that will provide information regarding shareholdings of any proprietary company (including ultimate holding company details, where applicable), and lodged notices in respect of any given company. The Australian Stock Exchange also retains records that can be accessed by any person.

In the case of substantial foreign holdings, the Federal Treasury, through the Foreign Investment Review Board, must also be notified. Finally, the Australian Competition and Consumer Commission takes an interest in all areas under the Trade Practices Act where it feels that any lessening or restriction in competition might occur.

Commentary – Austrian Newspaper Association (*Verband Österreichischer Zeitungen VÖZ*)

Economic aspects. At +0.7%, real economic growth (GDP) in Austria remained well below the long-standing average for the third consecutive year (unemployment 4.5%). With inflation at 1.3%, prices developed in line with the sluggish economy and a rising euro rate (reference rate for 2003: EUR 1 = \$ 1.13). Private consumption rose only marginally due to the moderate increase in net incomes. Although the advertising economy developed very differently over the year, 2003 nevertheless proved slightly better than the preceding years. In 2003, Austrian industry invested EUR 2.16 billion (according to listed prices, excluding discounts and taxes) in classical advertising (= advertising in daily and weekly newspapers, magazines, trade journals, television, radio, outdoor advertising and classical leaflets); this corresponds to a rise of +2.0%. As competition between the media has intensified, it may be assumed that the discounts granted have increased considerably. This must be kept in mind when reading the following figures.

With advertising revenues of EUR 1.14 billion (+2.2%), the print media remained by far the strongest advertising media in 2003. Daily newspapers accounted for EUR 549 million, a rise of +2%. Regional weekly newspapers reported considerable growth, boosting their share by +12.9% to EUR 164 million, while magazines dropped -3.7% below the preceding year's figure, to EUR 334 million. Revenues from advertising supplements in newspapers rose +13% to EUR 75 million altogether. Expenditure on online advertising was slightly lower (-2.4%) at just over EUR 10 million.

Considered in terms of economic sectors, investment goods remained the leading advertisers, as in previous years: their expenditure in 2003 totalled EUR 699 million, +2.3% more than in 2002. They were followed by brand articles, with advertising budgets of EUR 432 million, i.e. slightly less (-0.7%) than in the preceding year, as well as services, the retail trade, media and others (all data by: Media Focus Research).

Media policy. In December 2003, the Austrian parliament (Nationalrat) agreed on a new form of press subsidy and the corresponding law came into force on 1 January 2004. It encompasses three areas: sales subsidy, "special subsidy of the press" and "quality assurance and future promotion". Sales subsidy is open to all daily and weekly newspapers which meet with certain criteria. Among other things, they must achieve a minimum number of copies sold (10,000 copies for daily newspapers / 5,000 copies for weekly newspapers) and must be of more than just local interest. Daily newspapers are promoted with sums of equal amount, while weekly newspapers obtain subsidy for the first 15,000 copies on subscription. The purpose of "special promotion of the press", which is exclusively available to daily newspapers, is to maintain their diversity. The leading daily newspapers (nationwide and regional) are consequently excluded from this form of subsidy; the same also applies for daily newspapers with a circulation of more than 100,000 copies sold. The newspapers worthy of subsidy receive a uniform basic sum and additional funds for the first 25,000 copies of the circulation sold. The third aspect, "quality assurance and future subsidy", is used to promote further training for journalists, as well as other things. Newspapers can also apply for grants towards the costs of their salaried foreign correspondents and for training modules for their journalists. A reader service to promote reading of daily and weekly newspapers in schools is a new feature.

Under the old system, 15 daily newspapers received press promotion from the Federal budget totalling EUR 3.60 million in 2003. Six daily newspapers with lower advertising volumes additionally received special press promotion totalling EUR 7.38 million. In the preceding year, 45 weekly newspapers were promoted to the sum of EUR 1.88 million.

A new copyright law came into force on 1 July 2003. This law strengthens the rights of publishing houses with regard to the duplication and publication of newspaper articles for press clippings. Newspaper articles are consequently normally protected by copyright and only the owner of the rights has the "exclusive right" to publish the work in digital form or through the Internet. The right to duplicate a newspaper article in limited numbers for own use, including professional use, has been limited to copies on paper. Duplicates (copies) on media other than paper (hard disk, DVD, CD, floppy disk, etc.) are now only permitted exclusively for private use; they may not be used, either directly or indirectly, for economic or commercial purposes. All further use is therefore only possible with a corresponding licence.

Within the framework of an amendment of the Austrian Post Office Act in August 2003, the Austrian Newspaper Association (VÖZ) has achieved that the letter boxes in apartment blocks are now accessible to private delivery services (slits instead of the letter boxes which were hitherto only accessible to official postmen). New facilities are already required to conform to this regulation; existing facilities must be converted by 1 July 2006 at the latest.

A constitutional reform is currently being considered in Austria. In this context, the VÖZ has argued for means of safeguarding and extending the freedom of information and the press in Austria. The VÖZ demands comprehensive guarantees for the freedom of the press which must apply independently of the technology used, which must protect news and ideas independently of their content and alleged social value, and which must also include the process of distribution through any appropriate sales channel, as well as the marketing of media products. In addition, the VÖZ has also demanded free access to information of public importance. In view of the threat posed by new police surveillance methods for greater security, the Association has also demanded that the professional confidence of editorial offices should be acknowledged and anchored in the constitution.

Media development. The publishing houses have continued their efforts to restructure operations and cut costs in 2003. The purpose of these efforts was to safeguard the potentials for success and to reduce risk factors. The number of readers and print runs have generally remained stable in view of the persistently difficult basic economic conditions; with regard to the circulation sold, there has been a general trend away from selling single issues towards more subscriptions.

All the major daily newspapers are present in the Web with online products. The publishing houses have stepped up their efforts to offer an all-round service encompassing content, access and service provider functions as well as such special services as archive research, etc.

Other activities. The "PDN licence system" for press clippings (PDN = press documentation utilization) which has been



available since 2002 and was developed in consultation with institutions, companies and PR consultants has been improved and simplified by the VÖZ in line with the new regulations (see *Media policy*). This licence system provides institutions and companies with the conditions necessary to place their media documentation on a legally safe footing. The necessary licences can be acquired directly through the Association or through the media observers and PR consultants retained.

VÖZ and the public broadcasting company ORF discussed a common interpretation of the advertising rules for television as set out in the law. This process of discussion has resulted in TV advertising guidelines which have been independently applied by the ORF; among other things, they concern the distinction between advertising and programmes, product placement, sponsoring and advertising for periodical publications. In

addition to the advertising guidelines, an arbitration agreement was also concluded defining the conciliation procedure between VÖZ and ORF in the case of disputes. In keeping with this ruling, VÖZ has already caused the ORF to redress a number of grievances and change broadcasts.

Following the agreement on TV advertising, talks were held over the online programme offered by ORF which, in the opinion of VÖZ, goes beyond the framework permitted by the law. The Association is seeking to limit the content so that it is directly related to the programmes. Under no circumstances should it become an independent line of business isolated from the programmes for the public broadcasting company. Another objective is to ensure that this online programme is free of advertising or that restrictions on advertising are at least enforced.

POPULATION

Population by age and sex

	All adults		Male		Female		Households 000
	000	%	000	%	000	%	
14-19	567	8	290	9	277	8	3,312
20-24	491	7	256	8	235	7	
25-29	479	7	228	7	251	7	
30-34	585	9	296	9	289	8	
35-39	746	11	369	12	377	11	
40-44	609	9	300	9	309	9	
45-49	571	9	290	9	281	8	
50-54	483	7	226	7	257	7	
55-59	464	7	238	7	227	7	
60-64	523	8	251	8	272	8	
65-69	283	4	131	4	153	4	
70+	877	13	319	10	558	16	
Total	6,680	100	3,194	100	3,486	100	

Source: Media Analyse 2003

Population by social class and sex

	All adults		Male		Female	
	000	%	000	%	000	%
A	674	10	381	12	293	8
B	1,391	21	726	23	665	19
C1	1,286	19	672	21	625	18
C2	1,347	20	636	20	711	20
D	1,317	20	591	19	726	21
E	664	10	188	6	476	14
Total	6,690	100	3,194	100	3,496	100

Source: Media Analyse 2003

A= 612 points +
B= 435 - 611
C1= 345 - 434
C2= 259 - 344
D= 157 - 258
E= 0 - 156

Points are given for:
income of household (0-620)
education (0-120)
profession (20-140)
0 being lowest level, 620 being highest

Housewives (co-habiting persons)

	Housewives	
	000	%
under 25	65	4
25-34	248	14
35-44	359	20
45-54	314	17
55-64	349	19
over 65	500	27
Total	1,835	100

Source: Media-Analyse 2002

Age structure of daily readership

Age	% of readership	% reach within age group
14-19	7.5	66.7
20-29	13.8	71.2
30-39	19.5	73.8
40-49	18.5	78.6
50-59	15.6	82.6
60-69	12.6	78.6
70+	12.5	71.4

Source: Media-Analyse 2003

Newspaper reach (%)

	Daily
All adults	75.2
Men	77.6
Women	72.9
Main household shopper	75.7

Source: Media-Analyse 2003

Households

Occupancy	Households	
	000	%
1 person	1,025	31
2 people	977	29
3 people	604	18
4 people or more	706	21
without children	772	35
with children	1,433	65
1 child	706	32
2 children	526	24
3 children	155	7
4 or more children	46	2
Total	2,205	100

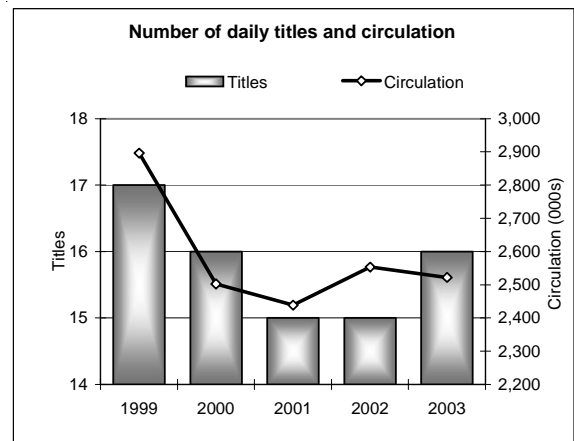
Source: Statistics Austria



NUMBER OF TITLES AND CIRCULATION

	1999	2000	2001	2002	2003	Change (%)	
						99/2003	2002/03
Number of titles							
All newspapers	-	-	-	-	212	-	-
Total dailies	17	16	15	15	16	-5.88	6.67
National dailies	7	8	8	8	8	14.29	0.00
Regional dailies	10	8	7	7	7	-30.00	0.00
Free dailies	-	-	-	-	1	-	-
Non-dailies	152	120	118	123	106	-30.26	-13.82
National non-dailies	12	11	13	13	15	25.00	15.38
Regional non-dailies	109	109	105	110	91	-16.51	-17.27
Free papers	31	73	75	75	90	190.32	20.00
Circulation (000)							
Total dailies	2,896	2,503	2,438	2,553	2,522	-12.91	-1.21
National dailies	2,121	2,141	2,018	2,089	2,060	-2.88	-1.38
Regional dailies	775	362	420	314	312	-59.74	-0.64
Free dailies *	-	-	-	150	150	-	-

Source: Austrian Newspaper Association, Austrian Presshandbook



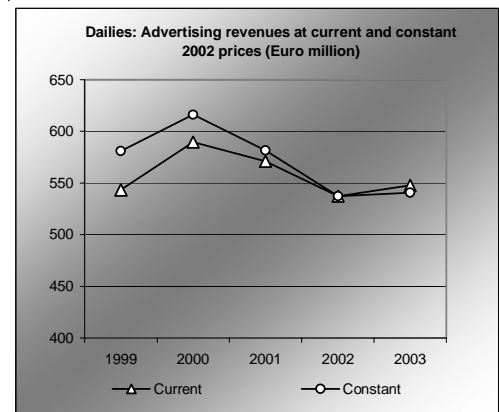
MORE FACTS

	1999	2000	2001	2002	2003	Change (%)	
						99/2003	2002/03
Advertising revenues (Euro million)							
Dailies	543	590	571	537	548 *	0.82	1.93
Dailies \$	581	616	581	537	541 *	-6.96	0.62
Volume of advertising sold (pages & page equivalents)							
Total	56,200	63,000	62,000	58,500	-	-	-

Source: VÖZ

* WAN/ZenithOptimedia estimate

\$ at constant 2002 prices



Top ten dailies (2002)

Title	Publisher	Circulation (000)	Readership (000)	Cover Price *		Format (mm)	Full page rate (Euro)	
				Euro	US\$		Mono	Colour
Kronen Zeitung	KRONE-Verlag GmbH.	1,007	2,925	0.80	0.75	198 x 265	24,407	31,244
Kleine Zeitung	Kleine Zeitung GmbH.	298	829	0.90	0.85	200 x 275	37,752	50,336
Kurier	Kurier Zeitungsverlag und Druckerei GmbH.	252	745	0.80	0.75	266 x 400	22,236	26,520
U-Express*	Danubia Werbung GmbH.	150	-	-	-	198 x 260	5,304	6,240
OÖ Nachrichten	Wimmer Medien GmbH.	132	375	0.90	0.85	270 x 410	12,136	16,990
Tiroler Tageszeitung	Schlüsselverlag J. S. Moser GmbH.	122	351	0.90	0.85	284 x 430	11,902	17,475
Die Presse	Die Presse Verlag GmbH.	120	339	1.20	1.13	266 x 421	16,200	19,440
Der Standard	Standard Verlag GmbH.	104	390	1.20	1.13	272 x 428	17,075	20,490
Salzburger Nachrichten	Salzburger Nachrichten Verlags GmbH.	98	304	0.80-0.90	0.75-0.85	270 x 410	10,775	15,085
Vorarlberger Nachrichten	Eugen Russ, Vorarlberger Zeitungsverlag GmbH.	72	233	0.80	0.75	278 x 425	6,290	8,806

Source: ÖAK, MA, VÖZ, publishers' statements

† Printed circulation not controlled by ÖAK

* weekday

Top ten advertising categories (2003)

Advertising sector	% of display ad revenue
Office/IT/communication	31.9
Food	20.6
Beverage	18.6
Auto	18.4
Capital goods	18.3
Cosmetics & pharmaceuticals	13.6
Media	13.5
Travel & tourism	11.5
Commerce & distribution	10.5
Audio/video/photography/optics	8.4

Source: FOCUS Institut

Top ten publishing companies (2003)

(ranked by total printed circulation)

Krone Verlag
Kleine Zeitung
Kurier Zeitungsverlag und Druckerei
Danubia Werbung
Wimmer Medien
Schlüssel Verlag J.S. Moser
Die Presse Verlagsgesellschaft
Salzburger Nachrichten Verlags
Standard Verlagsgesellschaft
Eugen Ruß Vorarlberger Zeitungsverlag und Druckerei Gesellschaft

Source: ÖAK



Top ten advertisers (2003)

Advertiser	Newspaper expenditure Euro (000)
Rewe Austria	27,272
Telekom Austria AG	26,265
Verlagsgruppe News	18,402
Spar Österreich	18,096
Media Saturn Beteiligungs AG	16,847
Raiffeisen Sektor Österreich	15,596
Bank Austria / CA	14,038
Hofer KG	12,509
Kika / Leiner	11,909
T-Mobile Austria	11,454

Source: FOCUS Institut

Newspaper colour capability & formats

Number of:	1998	1999	2000	2001	2002	2003
4-colour newspapers	16	16	16	15	16	16
Tabloids	8	8	8	8	7	7
Other	9	9	9	8	9	9

Source: Austrian Presshandbook

Online readership (page impressions per month)

Newspaper	1999	2000	2001	2002	2003
News Network	-	-	266,837,210	420,105,270	420,105,270
Krone.at	1,561,969	81,556,003	141,043,327	182,989,864	182,989,864
Top (Kurier group)	-	-	71,885,897	90,649,078	90,649,078
Austria.com	2,379,345	25,641,508	38,722,021	43,600,108	43,600,108
Kleinezeitung.at	-	-	-	-	33,863,645
Der Standard Online	2,047,458	13,625,405	16,214,628	21,233,249	21,233,249

Source: ÖWA 12/2003, the figures are independently audited

Please note that there was a change in the measuring technique (in April 2003) which does not allow figures to be compared with earlier ones.

Internet publishing (No. of online editions)

	1999	2000	2001	2002	2003
Dailies	15	15	14	14	14

Cover prices

	Euro
Single copy	0.60 - 1.50
Subscription	0.50 - 1.21

Source: Austrian Newspaper

Association, Austrian

Presshandbook

Media consumption (minutes per day)

Adults	2002
Dailies	30
Radio	209
Television	162
Internet	25

Source: Radiotest, Teletest, MTU's, AIM-Spezial

CROSS MEDIA OWNERSHIP

Owners	Regional TV	National TV	Regional Newspapers	National Newspapers	Radio
Regional TV Licensees	100% as long as areas of coverage can't overlap	Forbidden	100%	100%	100%
National TV Licensees	Forbidden	Only one private national TV licence	100%	100%	100%
Regional Newspaper Owners	100%, as long as owner does not cover more than 30% of readership in region	100%, as long as owner does not cover more than 30% of readership in Austria	Cartel Act	Cartel Act	100%
National Newspaper Owners	100%, as long as owner does not cover more than 30% of readership in region	100%, as long as owner does not cover more than 30% of readership in Austria	Cartel Act	Cartel Act	100%
Satellite TV Broadcasters	100%	100%	100%	100%	100%
Local radio Licensees	100% as long as the radio has no more than 30% of the audience in the region	100% as long as the radio has no more than 30% of the audience in the region	100%	100%	100% but every region may only be covered once by one owner (twice by one media chain)
National radio Licensees	No national licence	No national licence	No national licence	No national licence	No national licence
Foreign Investors	EEA companies: 100% Others: 49%	EEA companies: 100% Others: 49%	100%	100%	EEA companies: 100% Others: 49%

ADVERTISING EXPENDITURE & ECONOMIC DATA

Advertising expenditure

(Euro millions, in current prices)

	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
Newspapers	392	420	459	543	590	571	537	548	555	573	591
Magazines	325	352	415	477	544	547	576	579	588	608	628
Television	278	335	355	425	479	464	456				
Radio	129	131	152	151	158	162	147				
Cinema	6	9	9	9	11	10	9				
Outdoor	85	95	103	119	112	125	136				
Total	1,215	1,342	1,492	1,725	1,893	1,879	1,879	1,895	1,946	2,034	2,123

Source: 1996 Nielsen, 1997-2001 Focus Media Research (except cinema, which is Wegra), 2002-2006 ZenithOptimedia

Notes: Includes agency commission (at 15%) and classified, excludes production costs, before discounts
Newspapers figure refers only to dailies



Main economic indicators 1996-2002

	1996	1997	1998	1999	2000	2001	2002
1 US\$= 1.06 Euro at 2002 rate							
Gross Domestic Product (Euro billion)							
at current prices	178	183	190	197	207	212	217
% change	3.3	2.8	3.5	3.9	5.0	2.4	2.3
at 2002 prices	196	199	204	211	216	216	217
% change	3.3	1.5	2.6	3.3	2.5	-0.2	0.5
Gross Domestic Product per capita (Euro 000)							
at current prices	22.1	22.7	23.5	24.4	25.6	26.2	26.8
at 2002 prices	24.3	24.7	25.3	26.1	26.7	26.7	26.8
Population							
Millions	8.1	8.1	8.1	8.1	8.1	8.1	8.1
Consumer Price Index							
2002=100	90.9	92.1	92.9	93.5	95.7	98.2	100.0
%change	1.8	1.3	0.9	0.6	2.4	2.6	1.8
Ad.spend as a % of GDP	0.68	0.73	0.79	0.87	0.91	0.89	0.86
Advertising Expenditure Growth (%)							
at current prices	4.5	10.5	11.2	15.6	9.7	-0.7	-1.0
at 2002 prices	2.7	9.0	10.2	14.9	7.2	-3.3	-2.7

Source: IFS, ZenithOptimedia

Research

Circulation is audited by: Österreichische Auflagenkontrolle (ÖAK – Austrian ABC)

Readership is measured by: Verein Arbeitsgemeinschaft Media-Analysen

Methodology: Face-to-face interviews run throughout the year with a disproportionate random-sample of 17,663 individuals aged over 14, with five sample points. The sample to interview ratio is 8.7% and includes a standardised questionnaire.

Taxes

VAT on: sales 10% advertising 20%
newsprint 20% plant 20%
composition 20% (standard VAT rate 20%)

Newspaper profits are taxed at the usual 34% rate. There is a 5% tax on advertising.

Subsidies

Are there subsidies for the purchase of newsprint? There is a new law for press subsidy since 1 January 2004. Please see Media police in the commentary part.

Are loans granted at low interest rates for re-equipping or improving existing equipment? There is no general subsidy for capital investment, but preferential loans are available in the Vienna region.

All Austrian newspapers may apply to a committee for either a general subsidy or a special subsidy. The general subsidy is for all dailies and weeklies. The special subsidy is available to smaller dailies with less than 15% coverage and 22% advertising pagination.

	1996	1997	1998	1999	2000	2001	2002	2003
General subsidy Euro (000)	7,255	6,674	99,285	7,255	5,862	5,860	5,862 ¹	5,495
Special subsidy Euro (000)	11,991	11,032	10,968	11,991	9,593	7,551	7,593 ²	7,384
Total	19,246	17,706	110,253	19,246	15,455	13,411	13,455	12,879

¹ general subsidy for dailies and weeklies

² special subsidy for dailies under particular conditions

Discounts

on: post 0 rail 0 telephone 0 telegraph 0 telex 0

Ownership

Does any law exist governing publishing-house ownership, or the registration of shares in newspaper-publishing companies? No

Is there any law prohibiting or restricting foreign companies or individuals from owning shares, and in particular, the majority of shares, of domestic daily newspapers? No

Is there any law prohibiting daily newspaper or periodical publishers from operating radio or television stations in the same locality? Parliament enacted the Private TV Broadcasting Act on 5th July 2001, opening up the market for private terrestrial TV. The media clause of the Act allows newspaper publishers to hold 100% of a TV operator, except that publishers with a 30% share of the national newspaper readership may not own the national TV operator, and publishers with a 30% share of a region's newspaper readership may not own a TV operator in that region.

So as to guarantee disclosure and transparency in the capital structure and to avert silent partnerships, is there a law or rule making it possible to determine who actually owns a publishing company? Under the media law, a publication must print the name of its owner and his other holdings once a year.

Is there an antitrust law limiting concentration in the daily press? In March 2002 the Austrian Parliament enacted an amendment to the Cartel Act strengthening the control of abuses of dominance in the media sector. In case of breach of these prohibitions, the court may impose conditions with the effect of weakening or abolishing the dominant position.

Is further regulation of media concentration expected? No

Commentary – Azer H.Hasret, Secretary General, Azerbaijan Journalists Confederation (AJK) and Member, Azerbaijan Press Council

While the registration of the printed press became easier the problem of licensing TV and radio operations remained difficult. During 2003, the country saw no independent TV and radio channels. All the private channels were controlled by the ruling Yeni Azerbaijan Party and its government. Apart from the state TV channel, the country has four country-wide private channels: ATV, Space, Leader and ANS. The first three were launched by government allies people while ANS was launched by private individuals. But last year it fell under government control, and now the country suffers from a lack of independent TV and radio channels. It is also now impossible to launch a new one due to government restrictions on the licensing of TV operations.

The licensing procedure for printed media are easier though, and in 2003 there was a spate of new launches. This took the total number of titles over the 1,000 mark although only 10% of these appear regularly. Data in this chapter are only relevant to the newspapers which are published regularly.

The top three publishers are the State Publishing House "Azerbaijan", CBS and Express. There are a dozen others which do not specialize in printing newspapers. All newspaper printing presses were controlled by the government. The Chap Evi printing press, which tried to keep its independence, suffered government restrictions up to the power cut. Now this printing press is not operating. All opposition newspapers were forced out of the government printing press Azerbaijan after October 15, 2003 and Chap Evi offered to print them. After the campaign by national and international press freedom organizations opposition newspapers were invited back to the Azerbaijan printing press.

Newsprint costs were very low before the election, stabilizing at around US\$500 per ton. Immediately after the elections, the cost went up to US\$1,150 per ton and opposition newspapers suffered a paper shortage. As a result, in November the opposition newspapers were forced to suspend operations for at least five days. The newspaper owners

believed that the paper shortage problem was artificial as this section is monopolized by the government.

Launching a new print periodical in Azerbaijan is a straight forward process: one needs to submit to the Ministry of Justice one page of paper containing the title, founder's name and editor's name, address and circulation of the newspaper. One week after submission of this letter to the Ministry, the company is allowed to start publishing its newspaper. No registration fee or licensing is needed for this.

The year of 2003 saw gross violation of journalists' rights and new restrictions on media operations. According to data collected by Azerbaijan Journalists Confederation, some 200 cases of attacks and intimidation of media workers were recorded during the year.

Some newspapers like the opposition ones *Yeni Musavat*, *Azadliq*, *Hurriyyet*, *Yeni Zaman* and *Baki Khaber* were prevented from being distributed freely. Even after 15 October 2003, the state distribution enterprises refused to deliver these newspapers to the readers.

In 2003 Azerbaijani journalists established the first Press Council in the territory of CIS. The first Congress of Azerbaijani convened on March 15 bringing together more than 450 media workers and launching the Press Council. Nine of the members of the council are journalists while the remaining six represent non-media sectors. The Congress adopted the Code of Professional Conduct of Azerbaijani Journalists. The new organization is intended to solve problems between journalists and representatives of society and government officials out of court. More than 100 complaints were submitted to the Council, but many high-ranking authorities still prefer to apply to the courts. ANS TV is used as a government tool and as a result two opposition newspapers have been fined heavily. One of them is the influential *Azadliq* daily which lost three cases against ANS. And now *Azadliq* is to pay 85 million manat (US\$17,500) in fines.

POPULATION

Population by age and sex (2000)

	All individuals		Male		Female	
	000	%	000	%	000	%
Children	2,571	32	1,328	34	1,243	30
15-24	1,426	18	706	18	720	17
25-34	1,332	17	630	16	702	17
34-44	1,251	16	607	16	644	16
45-54	453	6	168	4	285	7
55-64	502	6	232	6	270	7
65+	442	6	181	5	261	6
Total	7,977	100	3,852	100	4,125	100

Source: State Statistical Committee of Azerbaijan Republic

Age structure of readership (1999)

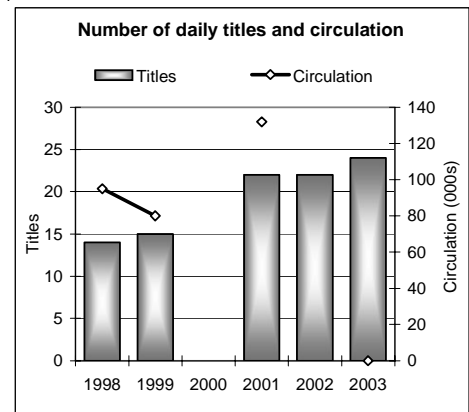
Age	% monthly reach within age group
18-20	53.3
21-24	70.0
25-34	56.0
35-44	59.5
45-54	58.6
55-64	40.0
65+	31.0



NUMBER OF TITLES AND CIRCULATION

	1998	1999	2000	2001	2002	2003 *	Change (%)	
							98/2003	2003/02
Number of titles								
National dailies	14	15	-	22	22	24	71.43	-
Non-dailies	352	329	-	-	-	11	-96.88	-
<i>National non-dailies</i>	273	250	-	-	-	8	-97.07	-
<i>Regional non-dailies</i>	7	7	-	-	-	3	-57.14	-
<i>Local non-dailies</i>	72	72	-	-	-	-	-	-
Sundays	-	-	-	5	-	-	-	-
Circulation (000)								
National dailies	95	80	-	132	-	-	-	-
Non-dailies	138	122	-	-	-	-	-	-
<i>National non-dailies</i>	136	120	-	-	-	-	-	-
<i>Regional non-dailies</i>	1	1	-	-	-	-	-	-
<i>Local non-dailies</i>	1	1	-	-	-	-	-	-
Sundays	-	-	-	15	-	-	-	-

* Includes only newspapers which are published regularly



MORE FACTS

Newsprint costs

	2001	2002	2003
Newsprint costs (average per ton)			
Azerbaijan Manat	3,600,000	-	2,465,000 * 5,670,000 **
US\$	750	-	-

* Except for the period October-November 2003

** October-November 2003

Cover prices

	US\$
Single copy	0.20
Subscription	0.18

Top ten dailies (2003)

Title	Publisher	Circulation (000)	Readership (000)	Cover Price US\$	Format
Yeni Musavat	Isa Qember	25.0	60	0.20	Tabloid
Azadliq	Gunduz Tahirli and Collective	10.0	30	0.20	Tabloid
Hurriyyet	Vuqar Mammedov	10.0	27	0.20	Tabloid
Ekspress	Mushfiq Safiyev	9.0	15	0.20	Tabloid
Baki Khaber	Tahir Tagiyev	6.6	18	0.20	Tabloid
Azerbaycan	Milli Mejlis	6.5	10	0.20	Broadsheet
Khalq qezeti	Administration of the President	6.5	10	0.20	Broadsheet
Echo	Ayna Publishing	6.0	8	0.20	Broadsheet
Zerkalo	Ayna Publishing	6.0	8	0.20	Broadsheet
Sherq	Akif Ashirli	6.0	14	0.20	Tabloid

Top advertising categories (2003)*

Advertising sector

Telecommunications
Oil and gas
Auto

* In daily newspapers; estimate by the Azerbaijan Journalists Confederation based on monitoring of major daily newspapers

Internet publishing (No. of online editions)

	1999	2000	2001	2002	2003
Dailies	2	-	14	-	26*
Non-dailies	3	-	-	-	6

* Two of which are published only as online formats

Top ten publishing companies (1999)

(ranked by total circulation)

Azerbaycan
Azerbaycan Ensiklopediyasi
Ismayil Media
Ayna Publishing House
Qanun Neshriyyati
Bakili oqlanlar
Maarif Neshriyyati
Yeni Nesil
Elm Neshriyyati
Casioglu

Research

Readership is measured by: Journalists Union Yeni Nesil along with the Centre of Sociological & Marketing Research
Methodology: Interviews

VAT on:

sales 0 advertising 0 newsprint 0
plant 0 composition 0 (standard VAT rate 0)

Ownership

Is there any law prohibiting daily newspaper or periodical publishers from operating radio or television stations in the same locality? No

Taxes

There is a 20% tax on advertising.

BAHAMAS, THE

General economic situation

GDP total US\$4.59 billion; GDP per capita US\$15,402 (purchasing power parity; 2002). Consumer price index 101.8 (2001 est.).

Performance of newspapers vs. other media

There are three private radio stations on New Providence and three in the Family Islands (on Grand Bahama, Abaco and Eleuthera). The state-owned Broadcasting Corporation of the Bahamas is the country's only TV station. Over 98% of New Providence and Freeport households now have access to

cable service.

Performance of different types of newspapers

There are several privately owned daily and weekly newspapers. The two major dailies in this country are the Tribune and the Nassau Guardian, which is the flagship paper of the Guardian Group. This group also publishes other newspapers including the Freeport News.

Sources: CIA - The World Factbook 2003 ; Freedom House ; Media Enterprises

POPULATION & MORE FACTS

Population by age and sex

	All individuals		Male		Female	
	000	%	000	%	000	%
0-14	86	29	43	29	43	28
15-64	195	65	96	66	99	65
65+	17	6	7	5	10	7
Total	298	100	146	100	152	100

Source: CIA - The World Factbook 2003

Top dailies (2003)

Title	Publisher	Circulation (000)	Format
The Nassau Guardian	The Nassau Guardian Ltd.	17	Broadsheet
The Tribune	family owned	16	Broadsheet
The Bahama Journal	Jones Communications Ltd.	3	Broadsheet
Freeport News	The Nassau Guardian Ltd.	3	Tabloid

Source: WAN from public sources

POPULATION & MORE FACTS

Population by age and sex

	All individuals		Male		Female		Households 000
	000	%	000	%	000	%	
0-14	288.6	28	97.0	26	191.6	29	99
15-64	706.5	69	261.9	71	444.6	68	
65+	30.3	3	10.2	3	20.1	3	
Total	1,025.4	100	369.1	100	656.3	100	

Source: CIA

Top dailies (2001)

Title	Circulation (000)	Readership (000)	Full page rate (US\$)	
			Mono	Colour
Al Ayam	36	109	3,610	4,880
Akhbar Al Khaleej	32	108	3,215	4,472
Gulf Daily News	11	73	2,567	5,134

Source: PARC

Top ten advertising categories (2001)

Advertising sector	Newspaper expenditure US\$ (000)
Retail stores	4,820
Publishing/media	3,063
Financial services	3,009
Vehicles	2,953
Government	2,056
Entertainment	1,911
Professional services	1,844
Travel, hotels & resorts	1,517
Office equipment	1,288
Commercial & public services	1,149

Source: PARC

Top ten advertisers (2001)

Advertiser	Newspaper expenditure US\$ (000)
Batelco	940
Kuwait & Bahrain	504
Trade Arabia.com	421
Dell	416
Standard Chartered	413
Nat'l Bank of Bahrain	410
Sada Al Ousbou	409
Giant	388
Club One	362
Hertz	294

Source: PARC

ADVERTISING EXPENDITURE & ECONOMIC DATA

Main economic indicators 1996-2002

	1996	1997	1998	1999	2000	2001	2002
1 US\$= 0.38 Dinar at 2002 rate							
Gross Domestic Product (Dinar million)							
at current prices	2,294	2,387	2,325	2,489	2,863	2,825	2,889
% change	4.3	4.1	-2.6	7.1	15.0	-1.3	2.3
at 2000 prices	2,297	2,331	2,277	2,472	2,863	-	-
% change	4.8	1.5	-2.3	8.6	15.8	-	-
Gross Domestic Product per capita (Dinar)							
at current prices	3,824	3,850	3,633	3,715	4,149	4,346	4,445
at 2000 prices	3,828	3,760	3,558	3,689	4,149	-	-
Population							
Millions	0.6	0.6	0.6	0.7	0.7	0.7	0.7
Consumer Price Index							
2000=100	99.9	102.4	102.1	100.7	100.0	-	-
%change	-0.5	2.5	-0.3	-1.4	-0.7	-	-
Ad.spend as a % of GDP							
	0.30	0.37	0.48	0.52	0.69	0.89	-
Advertising Expenditure Growth (%)							
at current prices	-5.0	28.8	25.1	16.7	51.2	28.2	-
at 2000 prices	-4.6	25.7	25.5	18.4	52.2	-	-

Source: IFS, ZenithOptimedia

Advertising expenditure (US\$ millions, in current prices)

	1995	1996	1997	1998	1999	2000	2001
Newspapers	9.7	10.3	14.0	16.9	14.8	25.2	27.1
Magazines	1.0	1.0	1.7	2.2	2.0	2.2	6.6
Television	8.7	7.2	8.0	10.4	17.7	24.1	31.7
Radio	-	-	0.1	0.3	0.2	0.9	0.8
Cinema	-	-	-	0.008	0.002	-	-
Outdoor	-	-	-	-	-	-	0.2
Internet	-	-	-	-	-	-	0.8
Total	19.4	18.4	23.7	29.7	34.7	52.4	67.2

Source: PARC

Notes: Before discounts, includes agency commission, excludes classified and production costs

BANGLADESH

General economic situation

GDP total US\$238.2 billion; GDP per capita US\$1,720 (purchasing power parity; 2002). Consumer price index 103.1 (2002 est.).

Performance of newspapers vs. other media

The government retains ownership and control over the electronic media, though two private TV channels have been operating under licenses granted by the government. In addition to an official government-owned wire service, there is one private wire service affiliated with overseas ownership.

Performance of different types of newspapers

All newspapers in Bangladesh are in the private domain. Approximately 1,566 newspapers and periodicals are published from Bangladesh in Bengali and English. The majority of those is published in Bengali. English-language titles appeal mainly to the educated urban elite. Of the total newspapers, 346 are daily, 5 bi-weekly, 615 weekly, 171 fortnightly, 346 monthly, 7 bi-monthly, 65 quarterly, 3 bi-annual and 8 annual. In fact, only 20-22 daily newspapers and 10-12 magazines are being published regularly.

Newspaper launches/closures

The government of Bangladesh banned the sale and distribution of a July edition of international news magazine *Newsweek*. It said the edition, published simultaneously from

New York, Singapore and Malaysia, contained "misleading and objectionable" comments about the Koran, Islam's holy book.

Ownership

To become a newspaper or magazine owner or publisher, permission, declaration and registration from the government is required. The government owns and controls virtually all radio and TV stations.

Media/press laws

The archaic Official Secrets Act introduced by British colonialists in 1926 makes it a crime to publish 'secrets.' The government has more than 25 laws that could rebuke, impose fines and punish journalists with jail terms up to several years.

State Support

Government can allocate subsidized newsprint imported at favourable tariff rates.

Employment

Only 6-8 newspapers and magazines pay salary and wages to their journalists and workers regularly.

Sources: CIA - The World Factbook 2003; US State Department; Freedom House; South Asia Tribune; Stanhope Centre UK; BBC News

POPULATION & MORE FACTS

Population by age and sex

	All individuals		Male		Female	
	000	%	000	%	000	%
0-14	47,263	34	24,255	34	23,008	34
15-64	86,543	63	44,262	62	42,281	63
65+	4,643	3	2,507	4	2,136	3
Total	138,449	100	71,024	100	67,425	100

Source: CIA - The World Factbook 2003

Top ten dailies (2003)

Title	Publisher	Language	Circulation (000)
Daily Ittefaq	-	(in Bengali)	-
Dainik Jugantor	Jamuna Group	(in Bengali)	-
Janakantha	-	(in Bengali)	-
Muktakantha	-	(in Bengali)	-
Prothom-Alo	-	(in Bengali)	-
The Independent	Free Press Ltd.	(in English)	31
The New Nation	-	(in English)	-
Bangladesh Observer	-	(in English)	-
The Daily Star	-	(in English)	-
Ajker Kagoj	-	(in Bengali)	-

Source: WAN from public sources

ECONOMIC DATA

Main economic indicators 1996-2002

	1996	1997	1998	1999	2000	2001	2002
1 US\$= 57.89 Taka at 2002 rate							
Gross Domestic Product (Taka billion)							
at current prices	1,663	1,807	2,002	2,197	2,371	2,533	2,714
% change	9.0	8.6	10.8	9.8	7.9	6.8	7.2
at 2002 prices	2,128	2,273	2,355	2,373	2,463	2,587	2,714
% change	8.8	6.8	3.6	0.8	3.8	5.0	4.9
Gross Domestic Product per capita (Taka 000)							
at current prices	13.6	14.5	15.2	16.3	17.3	18.0	19.3
at 2002 prices	17.4	18.3	17.9	17.6	17.9	18.4	19.3
Population							
Millions	122.1	124.3	131.8	134.6	137.4	140.4	140.4
Consumer Price Index							
2002=100	78.2	79.5	85.0	92.6	96.2	97.9	100.0
%change	4.1	1.7	6.9	8.9	4.0	1.7	2.1

Source: IFS, ZenithOptimedia

General economic situation

GDP total US\$4.153 billion; GDP per capita US\$14,993 (purchasing power parity; 2002). Consumer price index 99.4 (2002).

Performance of newspapers vs. other media

There are six radio stations, two of which are owned by the government. The government-owned Caribbean Broadcasting

Corporation (CBC) is the country's sole TV service, except direct satellite reception.

Performance of different types of newspapers

The two daily newspapers are privately owned.

Sources: CIA – *The World Factbook 2003* ; *Freedom House* ; *US State Department*

POPULATION & MORE FACTS

Population by age and sex

	All individuals		Male		Female	
	000	%	000	%	000	%
0-14	59	21	30	22	29	20
15-64	194	70	95	71	99	69
65+	24	9	9	7	15	10
Total	277	100	134	100	143	100

Source: CIA - *The World Factbook 2003*

Top dailies (2003)

Title
The Nation
The Barbados Advocate

Source: WAN from public sources

ECONOMIC DATA

Main economic indicators 1995-2001

	1995	1996	1997	1998	1999	2000	2001
1 US\$=	2.00	B\$ at 2002 rate					
Gross Domestic Product (B\$ billion)							
at current prices	4	4	4	5	5	5	5
% change	7.6	6.8	10.5	7.5	4.7	4.4	-1.6
at 2002 prices	4	4	5	5	5	5	5
% change	5.7	4.3	2.6	8.8	3.1	1.9	-4.1
Gross Domestic Product per capita (B\$ 000)							
at current prices	14.4	15.4	17.0	17.6	18.4	19.2	18.9
at 2002 prices	16.3	17.0	17.4	18.3	18.8	19.2	18.4
Population							
Millions	0.3	0.3	0.3	0.3	0.3	0.3	0.3
Consumer Price Index							
2002=100	86.1	88.1	94.9	93.7	95.2	97.5	100.0
%change	1.8	2.4	7.7	-1.3	1.6	2.4	2.6

Source: IFS, ZenithOptimedia

General economic situation

GDP total US\$90.19 billion; GDP per capita US\$8,737 (purchasing power parity; 2002). Consumer price index 142.8 (2002).

Performance of newspapers vs. other media

Some TV and radio broadcasts from other countries, including Russia, Poland and Lithuania, can be received in many parts of the country. State-controlled Belarusian Television and Radio (BTR) maintains its monopoly as the only nationwide TV station. State-run media outlets are subordinated to the president, whose regime controls press content and the appointment of senior editors. Local, independent TV stations operate in some areas and report local news relatively unhindered by the authorities. However, most of these stations report that they are under pressure not to report on national level issues or are subject to censorship. The government shut down the Minsk bureau of Russia's NTV television station because of its critical coverage of local politics.

Newspaper launches/closures

Several opposition newspapers were temporarily suspended. In 2002, the independent newspaper *Nasha Svaboda* was closed after a Minsk court handed down a fine of US\$55,000 in damages in a libel suit by a government official who claimed an article injured his reputation. The law specifies that the regime may close down a publication after two warnings. In 2002, the authorities issued warnings to the independent newspapers *Nasha Niva*, *Narodnaya Volya* and *Belaruskaya Delovaya Gazeta*. In 2003, the authorities suspended the publication of *Belorusskaya Delovaya Gazeta* for three months. Belarusian authorities have suspended or blocked the publication of other seven independent periodicals: *BDG*, *Dlya Sluzhebnogo Polzovaniya*, *Predprinimatelskaya Gazeta*, *Ekho*, *Salidarnasts*, *Mestnaya Gazeta Shag*, and *Navinki*. A Minsk court ordered an independent newspaper the *Mestnoye Vremya* Press daily and its publisher to cease their activities, following a complaint from the tax ministry, which claimed the paper had failed to notify a change in its legal address.

Advertising

Government imposes pressure on businesses not to advertise with independent media.

Circulation

Newspaper circulation data are unaudited. Circulation figures in this chapter represent data presented by newspapers

themselves, usually based on their print-runs, or estimates by market observers.

Ownership

The newspapers and other print media with the largest circulation are state-owned. Independent newspapers are mainly available in Minsk. All nationally-available radio and TV broadcasts originating in the country are government-owned.

Media/press laws

The law stipulates that public insults or libel against the president may be punished by up to 4 years in prison, 2 years in a labour camp, or by a large fine. The authorities also continue to make use of the articles in the criminal code which prohibits slandering and insulting the president or government officials. The criminal code provides for a maximum penalty of 5 years' imprisonment for such offences. The defamation law makes no distinction between private and public persons in lawsuits concerning defamation of character. A public figure who was criticized for poor performance in office may ask the prosecutor to sue the newspaper that printed the criticism. New security legislation allows state agencies to effectively seize control of all media outlets under cover of counter-terrorism operations.

Distribution

Several individuals seeking to distribute opposition newspapers were detained. Belposhta, Belarus' national postal service, has unilaterally cancelled a contract to distribute subscriptions to the prominent independent newspaper *Belorusskaya Delovaya Gazeta* in the first half of 2004. Belposhta will return subscription money to subscribers. Belsayuzdruk, the Belarussian national press's retail sales network, has meanwhile refused to distribute *Belorusskaya Delovaya Gazeta* through its kiosks in Minsk, Brest, and Vitsebsk.

State Support

There are limitations on foreign funding, on access to newsprint, and restrictions on the import of media-related materials.

Sources: CIA – *The World Factbook 2003*; US State Department; Freedom House; Reuters Foundation AlertNet; AFP; EJC Media News Digest

POPULATION & MORE FACTS

Population by age and sex

	All individuals		Male		Female	
	000	%	000	%	000	%
0-14	1,734	17	885	18	849	15
15-64	7,110	69	3,457	72	3,653	67
65+	1,479	14	491	10	988	18
Total	10,323	100	4,833	100	5,490	100

Source: CIA – *The World Factbook 2003*

	2000
Number of titles	
Total dailies	10
Non-dailies	600
Circulation (000)	
Total dailies	1,101
Non-dailies	10,339

Source: Reuters Foundation AlertNet

**Top dailies (2003)**

Title	Publisher	Circulation (000)	Format
Sovetskaya Belarussiya (Soviet Belarus)	State-owned	394	-
Narodnaya Hazieta (National Newspaper)	Supreme Soviet	207	-
Respublika (Republic)	State-owned	136	-
Belaruskaya Niva (Belarusian Field)	State-owned	85	-
Narodnaya Volya (National Will)	Private publishing house Magic	55	-
Vecherniy Minsk (Evening Minsk)	Vecherniy Minsk OOO	40	Broadsheet
Vo Slavu Rodiny (To the Fame of Homeland)	Ministry of Defense	18	-
Liberalnaya Gazeta (Liberal Newspaper)	Liberal Democratic Party	-	-

Source: WAN from public sources

ECONOMIC DATA**Main economic indicators 1996-2002**

	1996	1997	1998	1999	2000	2001	2002
1 US\$= 1,790.92 Belarus roubles at 2002 rate							
Gross Domestic Product (Belarus roubles billion)							
at current prices	192	367	702	3,026	9,134	17,200	25,500
% change	58.0	91.2	91.4	330.9	201.8	88.3	48.3
at 2002 prices	5,748	6,706	7,426	8,128	9,134	16,667	24,107
% change	3.5	16.7	10.7	9.5	12.4	82.5	44.6
Gross Domestic Product per capita (Belarus roubles 000)							
at current prices	18.7	35.9	68.9	301.4	913.4	1,725.2	2,557.7
at 2002 prices	560.8	656.2	728.7	809.6	913.4	1,671.7	2,417.9
Population							
Millions	10.3	10.2	10.2	10.0	10.0	10.0	10.0
Consumer Price Index							
2002=100	3.2	5.2	8.9	35.2	94.5	97.6	100.0
%change	52.7	63.9	72.9	293.7	168.6	3.2	2.5
Ad.spend as a % of GDP							
	0.18	0.22	0.14	0.00	0.00	0.00	0.00
Advertising Expenditure Growth (%)							
at current prices	8.3	17.0	-30.5	-	-	-	-
at 2002 prices	-29.1	-28.6	-59.8	-	-	-	-

Source: IFS, ZenithOptimedia

BELGIUM

Commentary – Association Belge des Editeurs de Journaux

GDP rose 1% thanks to growth in consumer spending, even though unemployment rose for the second year in a row. According to gross figures, adspend in daily newspapers increased 28% in 2003; this was mostly due to the success of the press agencies in negotiating preferential rates for press ads across the board.

Some papers have launched Sunday editions, hitherto very unusual. Circulation was stable in 2003, after 2 years of decline: -1.06% for French titles and +0.53% for Dutch ones. Total readership of the daily press increased slightly in 2003.

A number of papers have limited free access to their websites in favour of paying subscriptions.

POPULATION

Population by age and sex

	All individuals		Male		Female		Households 000
	000	%	000	%	000	%	
Children	1,802	17	921	18	881	17	4,368
15-24	1,250	12	635	13	615	12	
25-34	1,395	13	705	14	690	13	
35-44	1,603	15	812	16	791	15	
45-54	1,439	14	724	14	715	14	
55-64	1,103	11	543	11	560	11	
65+	1,763	17	726	14	1,037	20	
Total	10,355	100	5,066	100	5,289	100	

Source: Institut National de Statistique

Population by social class and sex

	All adults		Male		Female	
	000	%	000	%	000	%
A+B	1,673	19	886	21	787	17
C1	2,031	23	953	22	1,078	24
C2	1,448	16	784	18	664	15
D	489	6	245	6	244	5
E	3,235	36	1,442	33	1,793	39
Total	8,876	100	4,310	100	4,566	100

Source: Institut National de Statistique/CIM

A= senior managerial, administrative or professional

B= intermediate managerial, administrative or professional

C1= supervisory or clerical, junior managerial, administrative or professional

C2= skilled manual workers

D= unskilled manual workers

E= housewives/pensioners/unemployed/students/inactive

Adult occupancy

Household occupancy	Households 000
1 adult	1,413
2 adults	1,366
3 adults	699
4 adults	578
5 or more adults	312
without children	2,578
with children	1,790
Total	4,368

Source: Institut National de Statistique

Age structure of readership

Age	% of readership	% daily reach within age group
0-14	2.6	32.0
15-24	13.1	47.4
25-34	14.8	47.4
35-44	17.3	48.6
45-54	17.3	54.7
55-64	14.1	59.1
65+	20.6	53.1

Source: Association Belge des

Éditeurs de Journaux

Newspaper reach (%)

	Daily
All adults	50.7
Men	55.4
Women	46.3
MHS	48.7

Source: CIM 2002-2003

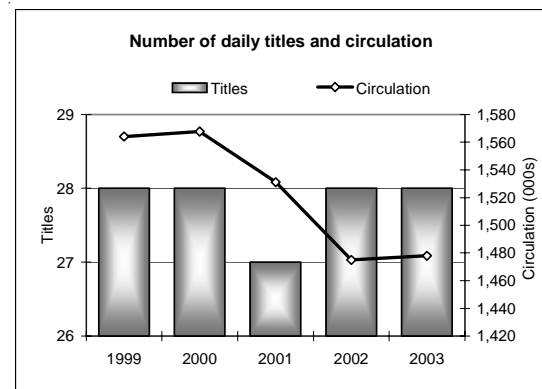
MHS = Main Household

Shopper

NUMBER OF TITLES AND CIRCULATION

	1999	2000	2001	2002	2003	Change (%)	
						99/2003	2002/03
Number of titles							
Total dailies	28	28	27	28	28	0.00	0.00
National	-	13	12	12	12	-	0.00
Regional	-	15	15	16	16	-	0.00
Free papers	-	-	1	1	1	-	0.00
Circulation (000)							
Total dailies	1,564	1,568	1,531	1,475	1,478	-5.50	0.20
National	1,076	1,084	1,056	1,013	1,021	-5.13	0.79
Regional	488	483	475	462	457	-6.33	-1.08
Free papers	-	-	320	176	200	-	13.64
Total annual sales (millions of copies)							
Total dailies	468	467	453	440	439	-6.20	-0.25
National	-	-	-	-	303	-	-
Regional	-	-	-	-	136	-	-
Free papers	-	-	-	-	43	-	-

Source: Association Belge des Éditeurs de Journaux/CIM





MORE FACTS

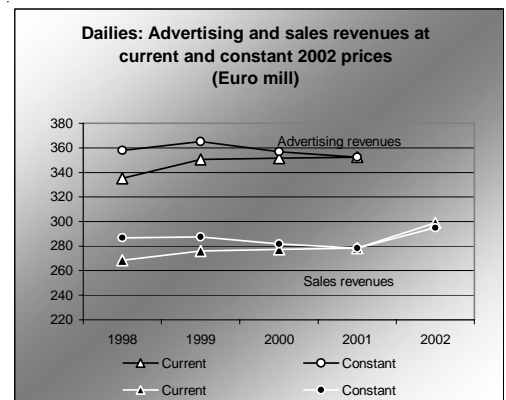
	1999	2000	2001	2002	2003	Change (%)	
						99/2003	2002/03
Advertising revenues (Euro million)							
Dailies	335.3	350.4	351.4	352.4	411.1 *	22.62	16.66
Dailies §	358.1	364.9	357.1	352.4	405.4 *	13.22	15.05
Sales revenues (Euro million)							
Total dailies	268.4	275.9	277.3	278.3	299	11.40	7.44
National	-	-	-	-	209	-	-
Regional	-	-	-	-	90	-	-
Total dailies §	286.6	287.3	281.8	278.3	294.9	2.87	5.95
Volume of advertising sold (pages & page equivalents)							
Total	18,559	-	-	-	-	-	-
In colour	13,103	-	-	-	-	-	-

§ at constant 2002 prices

* WAN/ZenithOptimedia estimates

Source: A.B.E.J./B.V.D.U./Mediamark Belgium

Advertising revenues include production costs and agency commission (15%), after discounts



Contribution of classified, display and insert advertising to total advertising income (%)

	1996	1997	1998	1999	2000
Display	59.8	56.8	52.6	56.2	56.0
Classified	40.2	40.9	44.4	41.7	41.8
Inserts	-	2.3	3.0	2.1	2.2

Source: A.B.E.J./B.V.D.U.

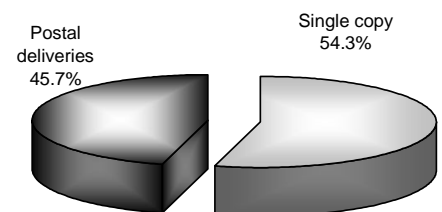
Daily newspapers only

Type of newspaper sales (%)

	Single copy	Postal deliveries
1999	57.0	43.0
2000	56.8	43.2
2001	56.2	43.8
2002	54.8	45.2
2003	54.3	45.7

Source: Association Belge des Éditeurs de Journaux

Type of newspaper sales in 2003 (%)



Distribution and newsprint costs

	1999	2000	2001	2002	2003
As % of average cover price					
Single copy sales	31	31	31	31	31
Postal deliveries	23	23	-	-	-
Home deliveries	-	31	31	31	31
Average distribution cost per copy					
Subscription	Euros 0.17	0.17	-	-	-
Single copy	Euros 0.22	0.22	0.25	-	-
Newsprint costs (average per ton)					
Euros	514	527	-	-	-

Source: Association Belge des Éditeurs de Journaux

Online readership

Newspaper	page requests/day*	Feb 2004
De Standaard	Standaard.be	401,852
De Tijd	Tijdnet.be	339,749
Le Soir	Le Soir.be	280,178
Het Nieuwsblad	Nieuwsblad.be	189,663
Het Laatste Nieuws	HLN.be	182,788

Source: CIM Metriweb

Internet publishing (No. of online editions)

	2001	2002	2003
Dailies	17	17	17

Source: Association Belge des Éditeurs de Journaux

Top ten advertising categories (2001)

Advertising sector
Services
Transport
Culture, tourism & leisure
Retail
Telecom
Home & office equipment
Food & drink
Clothing & accessories
Corporate
Cleaning products

Source: MDB CIM

Top ten publishing companies (2003)

Company	Total circulation
V.U.M.	377,823
Aurex	294,192
Sud Presse	124,706
De Vlijt	117,464
Rossel & Cie	104,202
Concentra	102,993
Editions de l'Avenir	101,021
Cie Nouvelle de Communications	83,462
Uigeverij de Morgen	52,252
IPM	48,479

Source: CIM

Top advertisers (2001)

Advertiser	Expenditure € (000s)
Belgacom	11,876
D'leteren	9,539
France Telecom	8,773
Ford	7,314
Carrefour	6,930
Public authorities	6,116
ING Group	6,089
Aldi	5,929
Deutsche Bank	5,876
Vlaamse Media Maatschappij	5,811

Source: MDB CIM

Employment & salary

	1998	1999	2000	2001
Total no. of Journalists	1,264	1,328	1,377	-
Total no. of Employees	4,356	4,768	4,822	-
Total salary and other employment costs				
Euros (Mill)	218	229	-	227

Source: A.B.E.J

Cover prices

	Euro
Single copy	0.90-1.30
Subscription	0.65-1.12

Source: Association Belge des Éditeurs de Journaux



Top ten dailies (2003)

Title	Publisher	Circulation (000)	Readership (000)	Cover Price		Format	Full page rate (Euro)	
				Euro	US\$		Mono	Colour
Het Laatste Nieuws/De Nieuwe Gazet	Aurex	294	985	0.90	0.85	Belge	25,931	29,356
Het Nieuwsblad/De Gentenaar	V.U.M.	211	772	0.90	0.85	Belge	24,525	27,970
La Meuse/La Capitale/La Nouvelle Gazette/La Province	Sud Presse	125	555	0.90	0.85	Tabloid	13,879	18,044
Gazet Van Antwerpen	De Vlijt	117	429	0.85-0.90	0.80-0.85	Broadsheet	17,280	19,690
Le Soir	Rosset	104	486	0.90	0.85	Belge	21,266	24,486
Het Belang Van Limburg	Concentra	103	382	0.90-1.00	0.85-0.94	Broadsheet	12,960	14,960
Groupe Vers l'Avenir	Editions de l'Avenir	101	396	0.90	0.85	Belge	13,960	16,360
Het Volk	V.U.M.	88	323	0.90	0.85	Belge	9,775	11,896
La Dernière Heure/Les Sports	C.N.C.	83	376	0.90	0.85	Tabloid	7,758	10,183
De Standaard	V.U.M.	79	271	1.00-1.25	0.94-1.18	Broadsheet	17,280	19,560

Source: Association Belge des Éditeurs de Journaux

Broadsheet: 8 x 540 mm Belge: 7 x 490 mm Tabloid: 5 x 385 mm

Newspaper colour capability & formats

Number of:	1999	2000	2001	2002	2003
4-colour newspapers	28	28	27	28	28
Broadsheets	16	16	14	7	7
Tabloids	2	2	1	8	8
Belge	10	10	12	13	13

Source: Association Belge des Éditeurs de Journaux

Direct subsidies

	1999	2000	2001	2002	2003
Total in Euro (million)	1.44	1.44	1.44	1.44	1.07

Source: Association Belge des Éditeurs de Journaux

ADVERTISING EXPENDITURE & ECONOMIC DATA

Advertising expenditure

(Euro millions, in current prices)

	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
Newspapers	260	257	299	322	395	407	281	386	462	469	489	518
Magazines	219	212	214	238	248	245	258	269	268	283	311	326
Television	393	409	500	656	691	782	811	865				
Radio	100	111	122	134	154	186	202	208				
Cinema	17	16	21	23	25	25	28	23				
Outdoor	129	139	149	158	159	162	173	182				
Internet	0	0	0	2	5	13	11	11				
Total	1,118	1,144	1,305	1,532	1,677	1,821	1,763	1,944	2,147	2,240	2,377	2,511

Source: 1996-2002 ACP, MediaMark Belgium

2003-2006 ZenithOptimedia

Notes: Includes agency commission, before discounts, excludes production costs and classified advertising

Main economic indicators 1996-2002

	1996	1997	1998	1999	2000	2001	2002
1 US\$= 1.06 Euro at 2002 rate							
Gross Domestic Product (Euro billion)							
at current prices	206	216	225	236	247	254	261
% change	2.2	4.9	4.3	4.8	4.7	2.8	2.8
at 2002 prices	228	235	243	252	257	258	261
% change	0.0	3.3	3.3	3.6	2.1	0.3	1.1
Gross Domestic Product per capita (Euro 000)							
at current prices	20.3	21.2	22.1	23.1	24.1	24.8	25.4
at 2002 prices	22.4	23.1	23.8	24.6	25.1	25.2	25.4
Population							
Millions	10.2	10.2	10.2	10.2	10.3	10.3	10.3
Consumer Price Index							
2002=100	90.3	91.7	92.6	93.6	96.0	98.4	100.0
%change	2.1	1.6	0.9	1.1	2.5	2.5	1.6
Ad.spend as a % of GDP							
	0.56	0.60	0.68	0.71	0.74	0.69	0.74
Advertising Expenditure Growth (%)							
at current prices	2.4	14.0	17.4	9.5	8.6	-3.1	10.3
at 2002 prices	0.2	12.3	16.3	8.2	5.9	-5.5	8.5

Source: IFS, ZenithOptimedia

Research

Circulation is audited by: CIM

Readership is measured by: CIM

Methodology: Face-to-face interviews with a sample of 11,000 people.

Taxes

VAT on: sales 0 advertising 21%
 newsprint 21% plant 21%
 composition 21% (standard VAT rate 21%)

There is a 34.2% tax on profit; this is the normal tax rate for all companies.

**Subsidies**

Are there any direct subsidies? The government ended direct subsidies for Flemish newspapers (which had been Euro 0.89 million, per year) at the beginning of 1998. Walloon newspapers still receive subsidies of Euro 1.07 million a year.

Investment subsidies vary according to region: in Flanders and Wallonia, investment by daily and weekly newspapers can receive a 15% subsidy in certain conditions. There are no specific provisions for the daily press in Brussels.

Amount of direct subsidies**Discounts**

on: post ⁽¹⁾ rail 100% ⁽²⁾ telephone 50% ⁽³⁾
telegraph 0 telex 0

¹ The special postal rates for newspapers and magazines cover a wide range of publications, including dailies, weeklies, and monthlies. It should be noted that non-commercial publications are subject to lower rates than newspapers.

² Transport of journalists

³ On the transmission of editorial copy within Belgium

Ownership

Does any law exist governing publishing-house ownership, or the registration of shares in newspaper-publishing companies? No

Is there any law prohibiting or restricting foreign companies or individuals from owning shares, and in particular, the majority of shares, of domestic daily newspapers? No

Is there any law prohibiting daily newspaper or periodical publishers from operating radio or television stations in the same locality? No. However, in the French community, broadcasting media have to communicate the identity of their shareholders as well as the interests of their shareholders in other media. The audit commission can thus evaluate if a shareholder is in a dominant position: such a position must not hamper the public right to access a plurality of broadcasting services.

So as to guarantee disclosure and transparency in the capital structure and to avert silent partnerships, is there a law or rule making it possible to determine who actually owns a publishing company? There is no specific provision for publishing companies. All Belgian companies must publish their annual accounts: these state in detail the administrators and their main interests in other companies.

Is there an antitrust law limiting concentration in the daily press? There is no anti-trust law specific to the press. The general law regulating competition applies to publishing companies as to all other companies.

Is further regulation of media concentration expected? No

BELIZE

General economic situation

GDP total US\$1.28 billion; GDP per capita US\$4,794 (purchasing power parity; 2002). Consumer price index 101.9 (2002).

Performance of newspapers vs. other media

There are 11 privately owned commercial radio stations, including one British military station that broadcasts news directly from London and other Caribbean nations. There are two privately owned TV stations that produce local news and feature programming. Several cable TV providers throughout the country rebroadcast foreign stations.

Performance of different types of newspapers

There are no daily newspapers and 10 privately owned weekly newspapers, three of which are owned by major political parties. The two main newspapers are the *Reporter* and *Amandala*.

Media/press laws

The Constitution permits the authorities to make 'reasonable provisions' in the interests of defense, public safety, public order, public morality, or public health. These provisions include forbidding any citizen to question the validity of the financial disclosure statements submitted by public officials. Anyone who questions these statements orally or in writing outside a rigidly prescribed procedure is subject to a fine of up to US\$2,500, or imprisonment of up to 3 years, or both. All newspapers are subject to the constraints of libel laws, but these laws had not been invoked in several years. The Belize Broadcasting Authority regulates broadcasting and asserts its right to preview certain broadcasts and to delete any defamatory or personally libelous material from political broadcasts. While this right exists, it has not been exercised in several years.

Sources: CIA - The World Factbook 2003; US State Department; Commonwealth Press Union

POPULATION & MORE FACTS

Population by age and sex

	All individuals		Male		Female	
	000	%	000	%	000	%
0-14	110	41	56	41	54	41
15-64	148	55	75	56	73	55
65+	9	3	4	3	5	4
Total	267	100	135	100	132	100

Source: CIA - The World Factbook 2003

	2002
Number of titles	
Non-dailies	10

BENIN

POPULATION & MORE FACTS

Population by age and sex

	All individuals		Male		Female	
	000	%	000	%	000	%
0-14	3,201	47	1,616	48	1,585	46
15-64	3,430	51	1,665	50	1,765	51
65+	155	2	65	2	90	3
Total	6,786	100	3,346	100	3,440	100

Source: CIA

Top dailies (2001)

Title	Circulation (000)	Full page rate (€)	
		Mono	Colour
La Nation	5	2,567	5,134

Source: HMI

ADVERTISING EXPENDITURE & ECONOMIC DATA

Main economic indicators 1996-2002

	1996	1997	1998	1999	2000	2001	2002
1 US\$=	696.99	CFA Franc at 2002 rate					
Gross Domestic Product (CFA Franc billion)							
at current prices	1,130	1,250	1,361	1,453	1,605	1,738	-
% change	12.6	10.7	8.9	6.8	10.5	8.3	-
at 2002 prices	1,377	1,472	1,516	1,613	1,711	1,783	-
% change	7.4	6.9	3.0	6.4	6.1	4.2	-
Gross Domestic Product per capita (CFA Franc)							
at current prices	202	222	234	243	260	271	-
at 2002 prices	246	261	260	269	277	278	-
Population							
Millions	5.6	5.6	5.8	6.0	6.2	6.4	6.4
Consumer Price Index							
2002=100	82.0	84.9	89.8	90.1	93.8	97.5	100.0
%change	4.9	3.5	5.7	0.3	4.2	3.9	2.6

Source: IFS, ZenithOptimedia

General economic situation

GDP total US\$2.7 billion; GDP per capita US\$1,262 (purchasing power parity; 2002). Consumer price index 103 (2002).

Performance of newspapers vs. other media

After a 10-year ban on private TV reception, in 2000 the government began to allow broadcasts of locally produced and foreign programs. There are more than 33 cable providers in the country with more than 10,000 subscribers. The government radio station broadcasts each day for two hours in the four major languages, Dzongkha, Nepali, English and Sharchop.

Performance of different types of newspapers

The country's only regular publication is Kuensel, a weekly

newspaper. It also reports stories on a daily basis through its online edition. Kuensel is published in three languages: English, Dzongkha, and Nepali. Nepalese, Indian and other foreign newspapers and magazines are available.

Readership

Readership of foreign newspapers and magazines is in the hundreds and primarily limited to government officials.

Media/press laws

The government does not censor cable content. Cable TV service is hampered by a high sales tax and the absence of a broadcasting law.

Sources: CIA - The World Factbook 2003; US State Department

POPULATION & MORE FACTS

Population by age and sex

	All individuals		Male		Female	
	000	%	000	%	000	%
0-14	847	40	439	40	408	39
15-64	1,208	56	622	56	586	57
65+	85	4	43	4	42	4
Total	2,140	100	1,104	100	1,036	100

Source: CIA - The World Factbook 2003

	2002	2003	Change (%) 2002/2003
Number of titles Non-dailies	1	1	0.00
Circulation (000) Non-dailies	15	-	-

BOLIVIA

General economic situation

GDP total US\$21.15 billion; GDP per capita US\$2,463 (purchasing power parity; 2002). Consumer price index 102 (2001).

Performance of newspapers vs. other media

There is a mix of state and privately run radio and television stations.

Performance of different types of newspapers

Newspapers are privately owned.

Advertising

State advertising revenues often go to newspapers that are favourable to the government.

Ownership

Raul Garafulic Gutierrez, president of the multimedia group Illimani Comunicaciones, owns four newspapers – *La Razon*, *Extra*, *Opinion*, and *El Nuevo Dia* – the ATB television network, and the Internet portal Bolivia.com. Garafulic is also the main shareholder in two telecommunications companies and is the president of the pension fund AFP Prevision.

Media/press laws

The Penal Code provides that persons found guilty of insulting, defaming, or slandering public officials for carrying out their duties may be jailed from one month to two years. If the insults are directed against the president, vice president, or a minister, the sentence may be increased by one-half.

Government agencies are not required to release information to the public, and reporters often have trouble accessing certain information, such as budgets and public officials' travel expenses.

Journalists

By law, journalists in Bolivia must have a university degree and be registered with the National Registry of Journalists. But enforcement is far from strict, and numerous journalists work in the press without a degree.

The 40-person La Paz Press Tribunal, an independent body, is authorized to evaluate journalists' practices that are alleged to violate either the Constitution or citizens' rights.

Sources: CIA – *The World Factbook 2003*; *Freedom House*; *US State Department*; *Committee to Protect Journalists*

POPULATION & MORE FACTS

Population by age and sex

	All individuals		Male		Female	
	000	%	000	%	000	%
0-14	3,187	37	1,624	38	1,563	36
15-64	5,015	58	2,453	58	2,562	59
65+	385	4	172	4	213	5
Total	8,587	100	4,249	100	4,338	100

Source: CIA - *The World Factbook 2003*

Top dailies (2003)

Title
La Razon
Los Tiempos
El Diario
Hoy
El Mundo
Ultima Hora

Source: WAN from public sources

BOSNIA & HERZEGOVINA

General economic situation

GDP total US\$7.3 billion; GDP per capita US\$1,830 (purchasing power parity; 2002). Consumer price index 103.5 (2002).

Bosnia and Herzegovina is divided into the Federation of Bosnia and Herzegovina with a predominantly Bosniak and Croat population, and Republika Srpska comprised mostly of Serbs. The Bosnian media landscape of today is primarily distinguished by two complex issues: the severely damaged economy of the country, and continued economic tensions. The unemployment rate hovers around 40%. Despite a brief recovery at the end of 1990s, economic growth has slowed down over the past two years.

Performance of newspapers vs. other media

Over the last eight years, more than US\$60 million has been allocated for media development in Bosnia and Herzegovina. There are several major news agencies: the Federation of Bosnia-Herzegovina News Agency (FENA); Serb News Agency (SRNA); SENSE News Agency; and the most powerful private news agency ONASA. There are 183 radio and 42 TV stations in Bosnia; 27 TV and 91 radio stations are based in the Federation of Bosnia and Herzegovina; 15 TV and 49 radio stations are operated from the Republika Srpska. Cabel TV is completely underdeveloped and exists only in rudimentary

form. The dominant players in the audiovisual market, with the highest ratings and freatest reach, are the public broadcasters on an entity level – Radio and Television of the Federation BiH, and Radio and Television of Republika Srpska. The greatest challenge to the public broadcasting TV channels comes from commercial TV networks Mreza Plus and Open Broadcast Network, each of which also covers some 80-90% of the population. There are still no conditions laid out for fair competition between media enterprises, especially in the broadcasting sector where public broadcasters have a better position than the private media outlets.

Performance of different types of newspapers

There are around 600 public print media on the Bosnian market, with total 226 newspapers being published. In Sarajevo alone, a city with 350,000 inhabitants, there are five daily newspapers and nine weeklies. The abundance of newspapers can be at least partially attributed to the financial support the country has been receiving from the international community. Print media content is largely moulded around, or restricted by, the ethnic character of the audience. This prevents print media reaching a broader audience on a state level and forces it primarily target the ethnic group that is dominant in the region where each particular paper is published. Few newspapers would survive without external support. There are several important weeklies: *Slobodna Bosna*



(circulation : 28,000), *Dani* (25,500), *Nedeljne Nezavisne Novine* (18,000), *Reporter* (10,000) and *Ljiljan* (8,000). Circulation data are based on assessments and relate to 2001.

Advertising

The total size of the advertising market is around 16.5 million euros net. Only 6% of the total advertising expenditure goes to print media, with TV receiving 65%, outdoor 25%, and radio sharing the rest with the printed press. About 80% of advertising expenditure comes from international corporations and their agencies. Considering the large amount of print media, the advertising market cannot support its survival.

Readership

Only an estimated 5% of the population read newspapers on a regular basis. In addition, the population has limited purchasing power to buy newspapers.

Online/digital publishing

The most important media portals are those of the daily newspapers *Dnevni Avaz*, *Oslobodjenje* and *Nezavisne Novine*. Other much used sites are those of weekly magazines,

such as *Dani* and *Slobodna Bosnia*.

Ownership

There is little transparency in media ownership in the country, including a difficulty to distinguish between the registered and real owners. Foreign citizens, who are not allowed to be the sole owner of a media outlet, can have a local citizen as a co-owner to circumvent the law.

Media/press laws

Parliamentary approval of a new defamation law in 2002 limited the threat of politically motivated defamation suits. However, government intervention and direct political patronage continue to restrict editorial independence.

Employment

There are six professional journalistic organizations in Bosnia and Herzegovina. The existing journalists' organisations created the Press Council that operates on the basis of the Press Code.

Source: CIA – *The World Factbook 2003* ; *Freedom House* ; *European Journalism Centre's Media Landscape*

POPULATION & MORE FACTS

Population by age and sex

	All individuals		Male		Female	
	000	%	000	%	000	%
0-14	775	19	398	20	377	19
15-64	2,812	70	1,439	72	1,373	69
65+	402	10	172	9	230	12
Total	3,989	100	2,009	100	1,980	100

Source: CIA - *The World Factbook 2003*

	2002
Number of titles	
All newspapers	226

Source: WAN research

Top dailies (2003)

Title	Publisher	Circulation (000)*
Dnevni Avaz	(in the Federation BiH)	25
Jutarnje Novine	NP V. novine ; in the Federation BiH	10
Oslobodjenje	Oslobodjenje ; in the Federation BiH	8
Nezavisne Novine	NN Banja Luka ; in Republika Srpska	7
Glas Srpski	National Assembly of Republika Srpska	7
Hrvatska Rijec	NP Nasa rijec SA ; in the Federation BiH	3
Dnevni List	National Holding ; in the Federation BiH	-
Sarajevske Novine	Max Music Company Sarajevo ; in the Federation BiH	-

Source: *European Journalism Centre's Media Landscape* ; *Press Council of Bosnia and Herzegovina* ; *Info Bureau of F BiH Government*

* Ranked by estimated circulation

ADVERTISING EXPENDITURE

Advertising expenditure (%)

	2002
Press	6
Television	65
Radio	4
Outdoor	25
Total	100

Source: *European Journalism Centre's Media Landscape*

General economic situation

GDP total US\$13.48 billion; GDP per capita US\$8,564 (purchasing power parity; 2002). Consumer price index 108.1 (2002).

Performance of newspapers vs. other media

Radio remains the most important medium of public communication. In past years, the government monopolized domestic radio broadcasting; however, two private radio stations, Yarona FM and Gabz FM, also broadcast, both in five of the country's 10 largest towns; state-owned radio continues to be the only domestic radio service broadcasting to the rest of the country. The privately owned Gaborone Broadcasting Company (GBC) broadcasts mostly foreign made programming and is the only other TV station operating in the country. GBC broadcasts reaches viewers only in the capital area. Independent radio and TV broadcasts from neighbouring South Africa are received easily in border areas. Satellite TV from a South-African based company is available readily, although its cost prevents many persons from subscribing to the service.

Performance of different types of newspapers

In 2002, seven privately owned weekly newspapers were published in Gaborone and distributed to the country's main cities and towns. One privately owned weekly newspaper was published in Francistown, the country's second-largest city. A total of nine privately owned monthly magazines were published nationally. The *Daily News* newspaper operated by the government included a second front page in Setswana, the most commonly spoken language.

Advertising

Government has used advertising bans in order to punish independent media outlets. In 2001, after a series of negative press stories about government officials, the government directed all government agencies and parastatals to refrain from advertising in the *Botswana Guardian* weekly and its sister newspaper, the *Midweek Sun*. The High Court overruled the decision to ban advertising and ordered the government to pay the newspapers' legal fees.

Circulation

The circulation of privately owned print media continues to be limited mostly to the main cities and towns.

Media/press laws

Undesirable news stories and sources are subject to censorship, and several libel suits have been filed against members of the press. Libel is a civil law matter; there were no criminal libel laws.

Copyright

The law provides copyright protection of broadcast material.

Press Council

In 2002, an independent, self-regulatory press council was established.

Sources: CIA – *The World Factbook 2003*; US State Department; Freedom House

Population by age and sex

	All individuals		Male		Female	
	000	%	000	%	000	%
0-14	622	40	315	41	307	38
15-64	881	56	425	55	456	57
65+	71	5	31	4	40	5
Total	1,574	100	771	100	803	100

Source: CIA - *The World Factbook 2003*

	2002
Number of titles	
Total dailies	1
Non-dailies	8

Source: US State Department

Top dailies (2002)

Title	Publisher
Daily News	Government

Source: WAN from public sources

ECONOMIC DATA

Main economic indicators 1996-2002

	1996	1997	1998	1999	2000	2001	2002
1 US\$= 6.33 Pula at 2000 rate							
Gross Domestic Product (Pula billion)							
at current prices	14	18	20	22	25	29	32
% change	15.8	24.9	13.7	6.8	15.9	14.9	11.6
at 2000 prices	19	22	24	23	25	27	28
% change	5.2	14.9	6.5	-0.9	6.7	7.9	3.2
Gross Domestic Product per capita (Pula 000)							
at current prices	9.5	11.6	12.8	13.4	15.1	18.5	20.6
at 2000 prices	12.9	14.5	15.0	14.5	15.1	17.4	17.9
Population							
Millions	1.5	1.5	1.6	1.6	1.7	1.6	1.6
Consumer Price Index							
2000=100	64.0	69.6	74.2	79.9	86.8	92.5	100.0
%change	10.1	8.7	6.7	7.7	8.7	6.6	8.1
Ad.spend as a % of GDP							
	0.13	0.12	0.12	0.00	0.00	0.00	0.00
Advertising Expenditure Growth (%)							
at current prices	-	13.4	18.3	-	-	-	-
at 2000 prices	-	4.3	10.9	-	-	-	-

Source: IFS, ZenithOptimedia

Commentary – Fernando Martins, Executive Director, ANJ

Daily newspaper circulation in Brazil dropped 7.2% in 2003. It was the third consecutive year of declining sales, following a drop of 9.1% in 2002, and of 2.7% in 2001. These three successive years of decline followed four years of continued expansion. In 2003 total circulation amounted to 6,470 million copies per day, compared to 7,670 million in the previous year.

The decline in sales since 2001 can be shown to be closely related to sluggish GDP growth over the period. According to the Brazilian Institute of Geography and Statistics - IBGE - GDP grew a mere 1.53% in 2002. For 2003, IBGE estimates that GDP contracted by 0.2%.

In 2002 gross billings of the Brazilian media industry grew by a nominal 3.4%. This represents a 16.5% decline once converted into US dollars. Against all expectations, and despite economic recession, the advertising market grew 12.2% in nominal terms in 2003, closing the year at R\$ 14.8 billion. Inflation over the period (measured by the Ample Consumer Price Index - IPCA) was 9.3%, so real growth amounted to 2.7%. This was a strong performance against the backdrop of economic stagnation. This figure represents 0.97% of Brazilian GDP, which - according to IBGE - amounted to R\$ 1.514 trillion in 2003.

The ad market accelerated over the course of 2003. Expenditure in the fourth quarter was 23.5% higher than in the third quarter, and expenditure in the second half was 31.4% than in the first. This suggests that there are good prospects for growth in the economy as a whole, and that these are being reflected in the

advertising market.

Such developments did not, however, affect all media equally. Free TV increased its share of total advertising spending 58.7% in 2002 to 60.4% in 2003. Newspapers saw their share of advertising spending shrink from 19.9% to 18.6%, a decline that was also felt, though with less intensity, by magazines, outdoor and pay-TV.

In common with other sectors of the Brazilian economy, the media industry has debts, and the search for new sources of funding for investment projects led the Brazilian Association of Newspapers (ANJ) along with other representative bodies, such as the Brazilian Association of Radio and Television Broadcasters (ABERT) and the National Association of Magazine Publishers (ANER), to commission a study to demonstrate the strategic importance of the media and report on the economic and financial status of the industry. This report, prepared by a specialised consultancy, was presented to the National Bank for Economic and Social Development (BNDES) in October 2003.

The outcome of negotiations with BNDES has been quite positive and, for the first time, the media sector is a focus of the Bank's Operational Policies. The project, currently in the final phase of preparation, foresees funding for investment programs, including financing for the purchase of newsprint, and for strengthening of the sector. The BNDES expects to conclude its research by June 2004.

POPULATION

Population by age and sex

	All individuals		Male		Female		Households 000
	000	%	000	%	000	%	
0-9	31,315	18	16,036	19	15,279	17	42,022
10-14	16,572	10	8,341	10	8,231	9	
15-19	17,159	10	8,648	10	8,511	10	
20-34	43,063	25	21,027	25	22,036	25	
35-44	23,982	14	11,437	14	12,545	14	
45-54	17,439	10	8,250	10	9,189	10	
55-64	11,065	6	5,237	6	5,828	7	
65+	11,057	6	4,736	6	6,321	7	
Total	171,652	100	83,712	100	87,940	100	

Source: PNAD - National Household Sample Survey 2002

Note: Excludes the rural population of the states of Amazonas, Acre, Rondônia, Roraima, Pará and Amapá

Newspaper reach (%)

	Daily
All adults	51
Men	45
Women	45
MHS	43

Source: Estudos Marplan EGM 2003

MHS = Main Household Shopper

Literacy by age and sex

	All individuals		Male	Female
	%	%	%	%
5-9	58.1	56.1	60.2	
10-14	96.1	94.9	97.5	
15-19	97.1	96.2	98.1	
20-24	95.4	94.0	96.8	
25-29	93.6	92.0	95.2	
30-39	91.6	90.0	93.1	
40-49	88.5	88.0	88.9	
50-59	80.3	81.6	79.2	
60+	67.3	69.6	65.5	
Total	85.9	85.2	86.5	

Source: PNAD - National Household Sample Survey 2002

Note: Excludes the rural population of the states of Amazonas, Acre, Rondônia, Roraima, Pará and Amapá

Age structure of readership

Age	% of readership	% reach within age group
10-14	7	33
15-24	25	53
25-34	22	54
35-44	19	51
45-54	14	51
55-64	7	46
65+	6	39

Source: Estudos Marplan EGM 2003

Ipsos Marplan Pesquisas Ltda.



NUMBER OF TITLES AND CIRCULATION

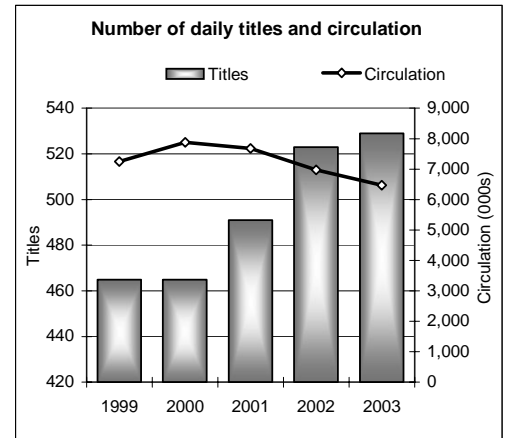
	1999	2000	2001	2002	2003	Change (%)	
						99/2003	2002/03
Number of titles						**	**
Total dailies	465	465	491	523	529	12.47	6.52
National dailies	5	-	-	-	-	-	-
Regional dailies	460	-	-	-	-	-	-
Non-dailies*	1,780	2,020	1,498	2,161	2,464	21.40	44.26
Circulation (000)							
Total dailies	7,245	7,883	7,670	6,972	6,470	-10.70	-7.20

Source: ANJ Data Base/IVC (Instituto Verificador de Circulação), ABRE (Associação Brasileira de Representantes de Veículos de Comunicação), JOVE/Mídia

Dados/Adjori-SC and Adjori-RS

* includes paid-for and free titles

** % change 99/2002 and 2001/02



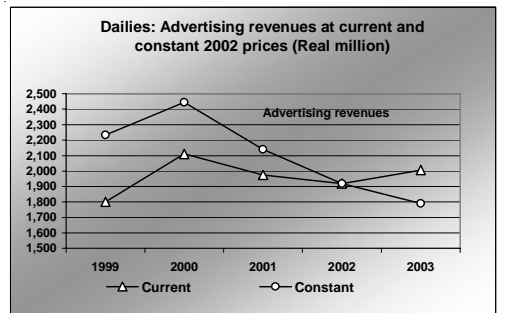
MORE FACTS

	1999	2000	2001	2002	2003	Change (%)	
						99/2003	2002/03
Advertising revenues (R\$ million)							
Dailies	1,800	2,110	1,975	1,919	2,006	11.44	4.53
Dailies §	2,233	2,444	2,141	1,919	1,791	-19.79	-6.67
Volume of advertising sold (pages & page equivalents)							
Total	-	170,208	170,226	173,202	166,362	-	-3.95

Source: Projeto Inter-Meios - Meio & Mensagem Publishing Company/Ibope Monitor

Includes classified and inserts, excludes production costs and agency commission, after discounts.

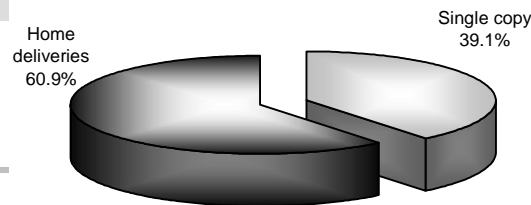
§ constant 2002 prices



Type of newspaper sales (%)

	Single copy	Home deliveries
1999	40.0	60.0
2000	48.0	52.0
2001	42.5	57.5
2002	41.3	58.7
2003	39.1	60.9

Type of newspaper sales in 2003 (%)



Source: Instituto Verificador de Circulação - IVC

Contribution of classified and display advertising to total advertising income (%)

	1999	2000	2001	2002	2003
Display	65.2	65.5	62.6	60.5	60.8
Classified	34.8	34.5	37.4	39.5	39.2

Source: Projeto Inter-Meios - Meio & Mensagem Publishing Company

Not including inserts

Top ten dailies (2003)

Title	Publisher	Circulation (000)	Cover price (weekday)		Format	Full page rate (R\$)	
			R\$	US\$		Mono	Colour
Folha de S.Paulo	Empresa Folha Da Manhã SA	314,908	2.20	0.67	Broadsheet	226,200	294,060
O Globo	Infoglobo Comunicações Ltda.	253,410	2.00	0.61	Broadsheet	142,900	186,580
O Estado de S.Paulo	S/A O Estado De S.Paulo	242,755	2.20	0.67	Broadsheet	163,180	212,140
Extra	Infoglobo Comunicações Ltda.	228,728	0.90	0.28	Broadsheet	92,980	122,000
O Dia	Editora O Dia SA	196,846	1.10	0.34	Broadsheet	106,704	145,080
Correio do Povo	Editora Jornalística Caldas Junior	181,560	0.90	0.28	Tabloid	18,025	24,334
Zero Hora	Zero Hora Editora Jornalística	176,696	1.50	0.46	Tabloid	19,250	25,987
Diário Gaúcho	Zero Hora Editora Jornalística	119,221	0.50	0.15	Tabloid	5,775	7,796
Gazeta Mercantil	Editora JB SA	103,095	1.30	0.40	Broadsheet	93,912	122,085
Diário de S.Paulo	Infoglobo Comunicações Ltda.	81,143	1.30	0.40	Broadsheet	127,300	165,480

Source: Instituto Verificador de Circulação, ANJ Database

**Top ten advertising categories (2003)**

Advertising sector	% of display ad revenue
Commerce (retail)	42.9
Property	14.3
Consumer services	11.9
Culture/entertainment/sports & tourism	10.5
Media	4.4
Public & social services	4.3
Finance & insurance	3.8
Telecommunications	1.5
Internet	1.3
Auto	1.0

Source: Ibope Monitor

Top ten advertisers (2003)

Advertiser	Newspaper expenditure R\$ (000)
Casas Bahia	236,051
Grupo Pão de Açúcar	189,973
Casa e Vídeo	116,539
General Motors	113,971
Ponto Frio	95,632
Kalunga	88,475
Fiat	82,969
CVC	79,665
Inpar	70,793
Tim Brasil	62,694

Source: Ibope Monitor

Internet publishing (No. of online editions)

	1999	2000	2001	2002	2003
Dailies	192	116	308	-	126
Non-dailies	-	-	166	-	4

Source: ANJ Data Base/ABRE

2003 data relates only to the 132 newspapers affiliated to ANJ

Cover prices

	R\$
Single copy	0.70-2.50

Source: ANJ Data Base

Data relates only to 132 newspapers affiliated to ANJ

Newspaper colour capability & formats

	1999	2000	2001	2002	2003
4-colour newspapers	109	110	118	114	-
Broadsheets	102	104	103	106	115
Tabloids	17	17	17	17	17

Source: ANJ Data Base

Data relates only to the 132 newspapers affiliated to ANJ

Newsprint costs (average per ton)

Imported newsprint	US\$405
--------------------	---------

Source: Samab - CIA Indústria e Comércio de Papel

Media consumption (minutes per day)

	2001	2002	2003
Newspapers	64	52	50
Radio	80	-	-

Source: Ibope Monitor

CROSS MEDIA OWNERSHIP

Owners	Regional TV	National TV	Regional newspapers	National newspapers	Radio
Regional TV licensees	Max. 10 in the whole country (max. 5 VHF and 2 per state)	Max. 10 in the whole country (max. 5 VHF and 2 per state)	No limit	No limit	Local: max 4 AM, 6 FM Regional: max 3 AM (2 per state) National: max 2 AM
National TV licensees	See above	See above	No limit	No limit	See above
Regional newspaper owners	See above	See above	No limit	No limit	See above
National newspaper owners	See above	See above	No limit	No limit	See above
Satellite TV broadcasters	See above	See above	No limit	No limit	See above
Local radio licensees	See above	See above	No limit	No limit	See above
National radio licensees	See above	See above	No limit	No limit	See above
Foreign investors	Forbidden	Forbidden	up to 30% of voting rights	up to 30% of voting rights	up to 30% of voting rights



ADVERTISING EXPENDITURE & ECONOMIC DATA

Advertising expenditure	(US\$ million, in current prices)										
	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
Newspapers	1,930	2,026	1,887	1,306	1,154	844	664	581	593	608	629
Magazines	654	773	788	568	566	415	314	310	316	324	335
Television	4,537	5,225	4,949	3,237	3,105	2,334	2,014				
Radio	315	345	335	284	263	189	224				
Outdoor	254	279	369	284	278	185	168				
Internet	0	0	0	45	105	122	128				
Total	7,690	8,648	8,328	5,724	5,471	4,089	3,512	3,302	3,364	3,444	3,557

Source: 1996-2002 Intermeios Project, 2003-2006 ZenithOptimedia

Notes: Includes agency commission and production costs (15%), excludes classified, before discounts.

Main economic indicators 1996-2002

	1996	1997	1998	1999	2000	2001	2002
Gross Domestic Product (US\$ billion)							
at current prices	775	808	787	537	602	509	452
Gross Domestic Product per capita (US\$ 000)							
at current prices	4.9	5.1	4.9	3.2	3.6	3.0	2.6
Population							
Millions	157.9	159.6	161.8	165.4	167.7	172.4	172.4
Ad.spend as a % of GDP							
	0.99	1.07	1.06	1.07	0.91	0.80	0.78
Advertising Expenditure Growth (%)							
at current prices	18.5	12.5	-3.7	-31.3	-4.4	-25.3	-14.1

Source: IFS, ZenithOptimedia

Research

Circulation is audited by: Instituto Verificador de Circulação (IVC), which audits more than half the daily press.

Readership is audited by: Ipsos-Marplan Pesquisas Ltda.

Methodology: Interviews are conducted using the stimulated recall technique with cards and logotypes. Interviewees are asked whether they have read a title at home, outside the home or on the internet over the previous three months. They are then asked how long it took to read each title and when was the last time they read time. Interviewees who have read a title within the last week are asked on which of the last seven days they have read the title.

Taxes

VAT on: sales 3% advertising 3%
 newsprint 0 plant 0
 composition 5% (standard VAT rate 18%)

The tax rate on profits is the same for all private companies (between 15% and 33%).

Discounts

on: post 0 rail 0 telephone 0 telegraph 0 telex 0

Ownership

Does any law exist governing publishing-house ownership, or the registration of shares in newspaper-publishing companies? Yes, see the next question.

Is there any law prohibiting or restricting foreign companies or individuals from owning shares, and in particular, the majority of shares, of domestic daily newspapers? Yes. Under the amended Article 222 of the Federal Constitution, legal entities may now own journalistic and radio broadcasting companies, and foreigners can own up to 30% of the voting capital in such companies.

"Art. 222. Newspaper and sound and image broadcasting companies shall be owned exclusively by native Brazilians

or those naturalised for more than ten years, or by legal entities that conform to Brazilian laws and have a branch in the country. § 1º In every circumstance, at least 70% of voting capital stock of newspaper and sound and image broadcasting must belong, directly or indirectly, to native Brazilians or those naturalised for more than ten years who shall be responsible for the management and intellectual guidance thereof.

§ 2º Editorial responsibility and programming selection and direction are the exclusive responsibility of native Brazilians or those naturalised for more than ten years, in any kind of social communication media.

§ 3º All electronic social communication media, independent of the technology used, should observe the principles stated in art. 221, in the form of specific law, that also guarantee priority for Brazilian professionals in the execution of domestic productions.

§ 4º The participation of foreign capital in firms will conform to Brazilian law as defined in § 1º.

§ 5º The national Congress shall be informed of any alterations in partnership control in firms in regard to § 1º."

Is there any law prohibiting daily newspaper or periodical publishers from operating radio or television stations in the same locality? No, but monopolies are forbidden. Article 220 of the Federal Constitution states:

The manifestation of thought, creation, expression and information, in any form, process or medium, shall not be subject to any restriction, with due regard to the provisions of this Constitution.

- Paragraph I: No law shall contain any provision that may present a hindrance to full freedom of press information in any medium of social communication, with due regard to the provisions of Article 5, Sections IV, V, X, XIII and XIV.
- Paragraph II: Any and all censorship of a political, ideological or artistic nature is forbidden.
- Paragraph V: Social communications media may not, directly or indirectly, be subject to monopoly or oligopoly.
- Paragraph VI: The publication of a printed social communications medium shall not be subject to licensing by authorities.

So as to guarantee disclosure and transparency in the capital structure and to avert silent partnerships, is there a law or rule making it possible to determine who actually owns a publishing company? Yes, see Article 222 above.

Is there an antitrust law limiting concentration in the daily press? Although, as mentioned above, the Federal Constitution prohibits media monopolies or oligopolies, no provisions have been made to enforce this legislation.

Is further regulation of media concentration expected? No

General economic situation

GDP total US\$6.5 billion; GDP per capita US\$18,156 (purchasing power parity; 2002). Consumer price index 98 (2002).

Performance of newspapers vs. other media

The only local broadcast media are operated by the government-controlled Radio Television Brunei. Cable TV is also available. Three Malaysian TV channels are received locally.

Performance of different types of newspapers

The sultanate has one English daily newspaper, Borneo Bulletin, close to the authorities, and the Malay daily, the Media Permata. Limited numbers of Media Permata copies are also available in Sabah and Sarawak. There is one Chinese language newspaper. Private newspapers are either owned and controlled by the sultan's family, or exercises self-censorship on political and religious matters. There is also a weekly government newspaper/newsletter Pelita Brunei. English and Malay newspapers from Malaysia and Singapore are allowed to circulate in the sultanate.

Newspaper launches /closures

In 2002, the country's second biggest daily newspaper, the

News Express and three journalists were sued successfully for slander and defamation by a private legal firm. The company that owned the newspaper declared bankruptcy and closed.

Media/press laws

In 2001, the government adopted the Local Newspapers Order 2001. This first press law includes provisions for prison sentences of up to three years and fines of up to 40,000 Brunei dollars (approximately 20,000 euros) for the publication of 'false news.' Media also have to register and obtain an annual license provided by the home affair minister, and deposit 100,000 Brunei dollars (50,000 euros) in a government account. The minister has the right to refuse to grant a newspaper a license without justification, to ban the sale of a foreign publication, and to suspend a media. Publications do not have any right to appeal. This law also prohibits media from obtaining foreign financing without government approval. The law requires prior government approval of foreign editorial staff, journalists and printers.

Sources: CIA - The World Factbook 2003; Freedom House; US State Department; Reporters Without Borders; BBC News

POPULATION & MORE FACTS**Population by age and sex**

	All individuals		Male		Female	
	000	%	000	%	000	%
0-14	106	30	54	29	52	30
15-64	242	68	128	68	114	67
65+	10	3	5	3	5	3
Total	358	100	187	100	171	100

Source: CIA - The World Factbook 2003

	2002
Number of titles	
National dailies	2
Circulation (000)	
National dailies	30

Source: WAN from public sources

Top dailies (2003)

Title	Publisher	Circulation (000)	Readership (000)	Cover Price	
				CURR.	US\$
Borneo Bulletin	Brunei Press Sdn Bhd	20	-	-	-
Media Permata	Brunei Press Sdn Bhd	10	76	-	0.80

Research

Readership is measured by: Market Test, Gallup International

Taxes

VAT on: sales 20% advertising 20%
newsprint 20% plant 20%
composition 20% (standard VAT rate 20%)

There are no other advertising or bill-posting taxes.

Ownership

Is further regulation of media concentration expected? There are plans to regulate printed publications.

Subsidies

Are there subsidies for the purchase of newsprint? No

Discounts

on: post 0 rail 0 telephone 0 telegraph 0 telex 0

POPULATION**Population by age and sex**

	All individuals		Male		Female		Households 000
	000	%	000	%	000	%	
Children	1,371	18	712	19	659	16	3,039
16-24	1,213	16	626	17	587	15	
25-34	1,119	14	568	15	551	14	
35-44	1,097	14	521	14	576	14	
45-54	1,232	16	641	17	591	15	
55-64	912	12	404	11	508	13	
65+	856	11	318	8	538	13	
Total	7,800	100	3,790	100	4,010	100	

Source: National Statistical Institute

Newspaper reach (%)

	Daily
All adults	45
Men	60
Women	31

Source: M3 Communications



Population by social class and sex

	All individuals		Male		Female	
	000	%	000	%	000	%
AB	524	7	354	9	170	4
C1	791	10	498	13	293	7
C2	992	13	458	12	534	14
D	3,854	49	1,802	47	2,052	52
E	1,640	21	741	19	899	23
Total	7,801	100	3,853	100	3,948	100

Source: National Statistical Institute

A= company owners

B= self employed

C1= employees in private companies

C2= employees in public sector

D= family-employed, not paid

E= not specified

Households

Occupancy	Households	
	000	%
1 person	-	-
2 people	1,180	39
3 people	711	23
4 people	635	21
5 or more people	513	17
Total	3,039	100

	Couples	
	000	%
without children	833	45
with children	1,018	55
Total	1,851	100

Source: National Statistical Institute

Housewives (co-habiting persons)

	Housewives	
	000	%
under 25	66	3
25-34	142	7
35-44	218	10
45-54	645	31
55-64	415	20
over 65	614	29
Total	2,100	100

Source: National Statistical Institute

Age structure of readership

Age	% of readership
Under 16	6
16-24	9
25-34	19
35-44	27
45-54	22
55-64	14
65+	3

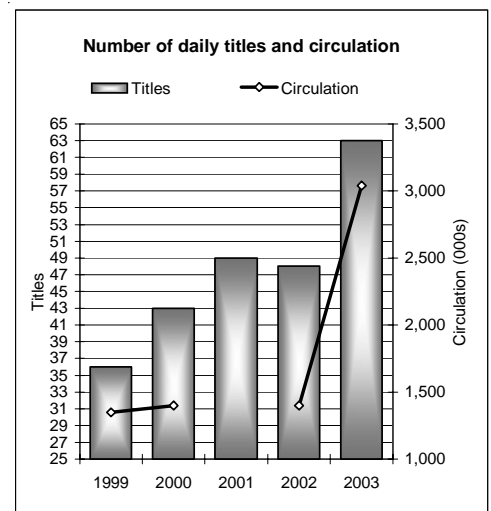
Source: M3 Communications

NUMBER OF TITLES AND CIRCULATION

	1999	2000	2001	2002	2003	Change (%)	
						99/2003	2002/03
Number of titles							
Total dailies	36	43	49	48	63	75.0	31.3
National dailies	12	12	18	19	24	100.0	26.3
Regional dailies *	20	26	26	24	39	95.0	62.5
Local dailies	4	5	5	5	-	-	-
Non-dailies	115	114	114	62	221	92.2	256.5
National non-dailies	80	80	80	62	163	103.8	162.9
Regional non-dailies	29	28	28	-	46	58.6	-
Local non-dailies	6	6	6	-	12	100.0	-
Sundays	4	6	6	-	-	-	-
Free papers	2	3	3	3	-	-	-
Circulation (000)							
Total dailies	1,350	1,400	-	1,400	3,039	125.1	117.07
National dailies	-	-	-	-	2,064	-	-
Regional/local dailies	-	-	-	-	975	-	-
Non-dailies	1,620	1,750	-	1,750	3,351	106.9	91.49
National non-dailies	-	-	-	-	2,771	-	-
Regional/local non-dailies	-	-	-	-	580	-	-
Sundays	161	170	-	-	-	-	-
Free papers	910	910	-	910	-	-	-

Source: M3 Communications

* includes local dailies in 2003



MORE FACTS

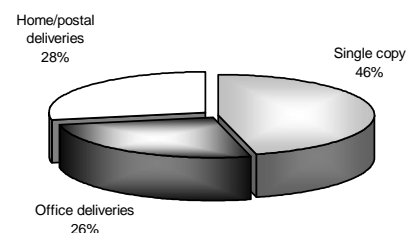
Type of newspaper sales (%)

	Single copy	Home deliveries	Postal deliveries
1999	74	15	11
2000	75	15	10
2001	75	15	10
2002	78	10	12

	Single copy	Office deliveries	Home/postal deliveries
2003	46	26	28

Source: M3 Communications

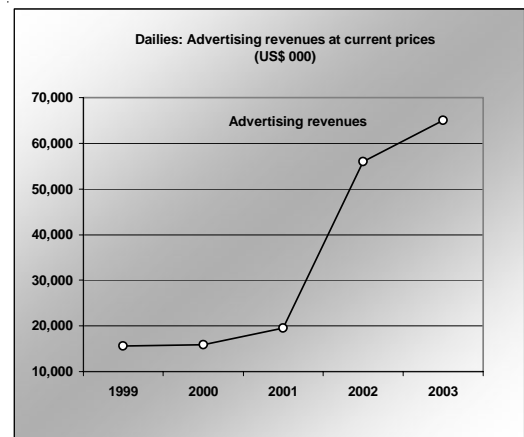
Type of newspaper sales in 2003 (%)





	1999	2000	2001	2002	2003	Change (%)	
						99/2003	2002/03
Advertising revenues (US\$ 000)							
Dailies	15,600	15,900	19,600	56,000	65,000	316.67	16.07
Non-dailies	9,300	9,500	9,500	14,500	17,382	86.90	19.88
Sundays	910	920	920	-	-	-	-
Free papers	161	162	162	2,500	-	-	-
Online	155	156	156	180	280	80.65	55.56
Volume of advertising sold (pages & page equivalents)							
Total	28,750	29,890	-	35,000	31,700	10.26	-9.43
In colour	6,250	6,400	-	7,500	7,200	15.20	-4.00

Source: M3 Communications



Contribution of classified, display and insert advertising to total advertising income (%)

	1999	2000	2001	2002	2003
Display	76	72	72	75	90
Classified	18	17	17	15	7
Inserts	6	6	6	5	3

Source: M3 Communications

Type of newspaper sales (%)

	Single copy	Home deliveries	Postal deliveries
1999	74	15	11
2000	75	15	10
2001	75	15	10
2002	78	10	12

Top ten dailies (2003)

Title	Publisher	Circulation (000)	Readership (000)	Cover Price		Format	Full page rate (Lev)	
				LV	US\$		Mono	Colour
Trud	WAZ	250	1,315	0.70	0.34	Tabloid	9,643	13,020
24 Hours	WAZ	161	800	0.70	0.34	Tabloid	5,905	7,965
Standart	Standart News	70	200	0.50	0.24	Tabloid	4,680	7,254
Monitor	Press Group "Monitor"	35	270	0.60	0.29	Tabloid	4,307	6,056
Nosten Trud	WAZ	31	89	0.40	0.19	Tabloid	998	1,359
Sega	Sega	30	90	0.50	0.24	Tabloid	1,967	2,809
Novinar	Novinar	29	130	0.40	0.19	Tabloid	2,918	-
Duma	-	14	42	0.50	0.24	Tabloid	1,066	1,689
Pari	Rubicon ITC Pari	9	30	1.00	0.48	Tabloid	3,927	7,854
Dnevnik	Investment Information Agency	7	30	1.00	0.48	Broadsheet	4,200	6,000

Source: M3 Communications

Top ten advertising categories (2002)

Advertising sector	% of display ad revenue
Telecommunications (corporate brands)	17.5
Mobile phones	7.8
Cars	5.0
Radio stations	3.0
Liquor	2.8
Computers	2.6
Beer	2.1
Credit services	2.0
Computer software	1.5
Cars (corporate brands)	1.5

Source: Taylor Nelson Sofres

Top ten publishing companies

(ranked by total circulation)
Westnikarska Grupa Bulgaria
Sega Group
Press Group Monitor
Standart News
Business Media Group
Cash Bulgaria
All Capital Weekly
Investment Information Agency
Infomedia
Euro Press

Source: M3 Communications

Top ten advertisers (2003)

Advertiser	Newspaper expenditure (Lev 000)
Mtel	9,718
Globul	5,569
OTE	4,589
Sporten totalizator	1,382
DZI-Roseximbank	1,003
Vinprom-Peshtera	945
PIB	855
Coca Cola	781
Zagorka & Ariana Breweries	591
Biohim	300

Source: Taylor Nelson Sofres



Internet publishing (No. of online editions)

	1999	2000	2001	2002	2003
Dailies	21	27	11	11	14
Non-dailies	12	13	-	-	20

Source: M3 Communications

Cover prices

	BGN
Single copy	0.40-1.00
Subscription	0.65

Source: M3 Communications

Online readership

page impressions/month	2003
Dnevnik www.dnevnik.bg	1,804,390
Pari www.pari.bg	290,549
Trud www.trud.com	287,137
Standart www.standartnews.com	270,835
Duma www.duma.bg	

Source: M3 Communications

Media consumption (adults - minutes per day)

	1999	2000	2001	2002	2003
Newspapers	16	16	20	20	45
Magazines	11	15	15	15	7
Radio	30	40	40	40	120
Television	68	78	78	78	180
Internet *	46	58	58	58	25

Source: M3 Communications

* adults with internet access 1999-2002

Colour capability

& formats (dailies)

Number of:	2002	2003
4-colour newspapers	28	-
Broadsheets	1	1
Tabloids	47	62

Employment

	2000	2001	2002	2003
Total no. of journalists	3,000	-	-	6,500
Total no. of employees	-	-	-	11,000

Source: M3 Communications

ADVERTISING EXPENDITURE & ECONOMIC DATA

Main economic indicators 1995-2001

	1996	1997	1998	1999	2000	2001	2002
1 US\$= 2.08 LV at 2002 prices							
Gross Domestic Product (LV million)							
at current prices	1,761	17,433	22,421	23,790	26,753	29,618	32,324
% change	100.1	889.9	28.6	6.1	12.5	10.7	9.1
at 2002 prices	31,119	26,594	28,820	29,813	30,391	31,339	32,324
% change	-9.7	-14.5	8.4	3.4	1.9	3.1	3.1
Gross Domestic Product per capita (LV)							
at current prices	211	2,098	2,714	2,898	3,365	3,763	4,107
at 2002 prices	3,722	3,200	3,489	3,631	3,823	3,982	4,107
Population							
Millions	8.4	8.3	8.3	8.2	8.0	7.9	7.9
Consumer Price Index							
2002=100	5.7	65.6	77.8	79.8	88.0	94.5	100.0
% change	121.6	1,058.4	18.7	2.6	10.3	7.4	5.8
Ad.spend as a % of GDP							
	0.38	0.24	0.31	0.45	0.67	0.87	1.06
Advertising Expenditure Growth (%)							
at current prices	119.4	519.2	69.4	52.0	68.6	44.2	44.2
at 2002 prices	-1.0	-46.5	42.8	48.1	52.8	34.3	34.3

Source: IFS, ZenithOptimedia

Note: The Lev was redenominated in July 1999 to New Lev 1 = Old Lev 1,000.

All back-data have been adjusted accordingly.

Advertising expenditure

(Lev million, in current prices)

	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
Newspapers	2.3	14.7	19.7	32.3	44.2	40.0	60.0	67.0	70.0	72.0	74.0
Magazines	0.3	3.4	5.2	8.4	10.2	14.0	40.0	35.0	40.0	43.0	45.0
Television	4.1	23.3	45.2	65.8	108.4	179.0	200.0				
Outdoor	-	-	-	-	16.8	26.0	42.0				
Total	6.7	41.4	70.1	106.6	179.6	259.0	342.0	398.0	430.0	460.0	497.0

Source: 1996-2002 BBSS Gallup, 2003-2006 ZenithOptimedia

Notes: Before discounts, includes classified, excludes production costs, includes agency commission

General economic situation

GDP total US\$14.51 billion; GDP per capita US\$1,097 (purchasing power parity; 2002). Consumer price index 103.5 (2002).

Performance of newspapers vs. other media

There are numerous independent radio stations and a religious TV station. The government licensed several private radio stations in 2002. Voice of America, Radio France International, Africa Number 1, and the British Broadcasting Corporation broadcast without government interference.

Performance of different types of newspapers

There are 86 periodical press titles, including five daily and

27 weekly newspapers; some newspapers appear only occasionally.

Media/press laws

Under the 1993 information code, media outlets accused of endangering national security of distributing false news can be summarily banned. The Supreme Council on Information, a state-run media supervisory body, regulates the broadcast media.

Sources: Freedom House; US Department of State; The Supreme Council of Information, Burkina Faso

POPULATION & MORE FACTS

Population by age and sex

	All individuals		Male		Female	
	000	%	000	%	000	%
0-14	6,095	46	3,058	47	3,037	45
15-64	6,753	51	3,297	51	3,456	51
65+	381	3	162	2	219	3
Total	13,229	100	6,517	100	6,712	100

Source: CIA - The World Factbook 2003

Top dailies (2003)

Title	Publisher	Circulation (000)
L'Observateur Paalga	-	5
Sidwaya	Government	3
Le Pays	-	3
Bulletin Quotidien	Government	1
L'Express du Faso	-	-

Source: The Supreme Council of Information, Burkina Faso

	2002
Number of titles	
Total dailies	5

Source: The Supreme Council of Information, Burkina Faso

General economic situation

GDP total US\$3.146 billion; GDP per capita US\$516 (purchasing power parity; 2002). Consumer price index 112 (2002).

Performance of newspapers vs. other media

The government-owned radio broadcast in the Kirundi language, French, and Swahili, and offered limited English programming. The independent radio station, Radio Bonesha, formerly Umwizero, continued its broadcasts in French, Kirundi, and Swahili, and the independent station Radio Public Africa (APR) broadcast in French, Kirundi, and Swahili; both stations received funding from international donors in 2002. Listeners could receive transmissions of the British Broadcasting Corporation (BBC), the Voice of America, and Radio France Internationale. Due to widespread poverty and limited literacy, radio remained the most important medium of public information.

Performance of different types of newspapers

The government-owned newspaper *Le Renouveau* is published three times a week. Political tracts circulate, and two private faxed newsheets, *Azania* and *NetPress*, are published almost daily and represent mainly Tutsi political viewpoints.

Newspaper launches/closures

The one opposition newspaper, *La Lumiere*, ceased publication in 2001 after it published lists of colonels, their hometowns, and their ownership shares in parastatal companies; the owner received threats from unknown persons and as a result decided to cease publishing. The state-run National Communication Council, which is charged with regulating the media, occasionally bans or suspends independent publications and restricts

permissible reporting. In 2002, government banned *NetPress* for several days, claiming that it imposed the ban to defend professional journalistic standards; it also suspended *Azania* for one month, and accused it of plagiarizing stories; and it banned the newspaper *PanAfrika* for publishing 'extremist and subversive' material.

Ownership

The government owns and operates the main broadcast media as well as the country's only regularly published newspaper. Private publications and radio stations function sporadically.

Media/press laws

The 1997 press law requires that newspaper articles undergo review by a government censor four days before publication. The press law also forbids the dissemination of 'information inciting civil disobedience or serving as propaganda for enemies of the Burundian nation during a time of war.'

Sources: CIA - The World Factbook 2003; US Department of State; Freedom House

POPULATION

Population by age and sex

	All individuals		Male		Female	
	000	%	000	%	000	%
0-14	2,849	47	1,439	48	1,410	46
15-64	3,081	51	1,517	50	1,564	51
65+	166	3	66	2	100	3
Total	6,096	100	3,022	100	3,074	100

Source: CIA - The World Factbook 2003

POPULATION & MORE FACTS

Population by age and sex

	All individuals		Male		Female		Households 000
	000	%	000	%	000	%	
0-15	5,622	43	2,861	45	2,761	41	2,189
16-24	2,652	20	1,321	21	1,331	20	
25-34	1,674	13	798	13	876	13	
35-44	1,368	10	626	10	742	11	
45-54	834	6	345	5	489	7	
55-64	513	4	217	3	296	4	
65+	436	3	180	3	256	4	
Total	13,099	100	6,348	100	6,751	100	

Source: 1998 census/2001 projection

Top dailies (2002)

Title	Circulation (000)	Full page rate (US\$)	
		Mono	Colour
Rasmei Kampuchea	20	807	1,408
Koh Santepheap	10	581	1,938
Cambodia Daily	4	285	690
Cambodge Soir	3	250	450
Chakraval	2	-	-
Evening News	2	-	-

Source: ZenithOptimedia - no circulation figures are audited

Top ten press advertising categories (2001)

Advertising sector	Press expenditure US\$ (000)
Telecoms	774
Tobacco	602
Education	308
Bars/restaurants/clubs	198
Accommodation	174
Fuel	119
Packaged food	106
Financial	89
Airlines	88
Electronics	87

Source: IRL

Top ten press advertisers (2001)

Advertiser	Press expenditure US\$ (000)
Jet Cigarettes	211
MobiTel	210
Shinawatra	174
Tele2	117
Mild Seven	92
Samart	87
Banana Center	77
Sokimex	68
Norton University	66
Ara Red Cigarettes	57

Source: IRL

ADVERTISING EXPENDITURE & ECONOMIC DATA

Main economic indicators 1996-2002

	1996	1997	1998	1999	2000	2001	2002
1 US\$=	3,912						
							Riyels at 2002 rate

Consumer Price Index

2002=100	79.8	82.3	94.5	98.3	97.5	96.9	100.0
% change	10.1	3.2	14.8	4.0	-0.8	-0.6	3.2

Advertising Expenditure Growth (%)

at current prices	71.9	21.2	-16.5	15.3	110.9	33.3	-20.5
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Source: IFS, ZenithOptimedia

Advertising expenditure (US\$ million, in current prices)

	1996	1997	1998	1999	2000	2001	2002
Newspapers	1.7	1.9	1.6	1.9	4.0	3.8	3.8
Television	6.8	9.1	9.1	11.6	30.6	45.3	45.3
Outdoor	8.0	9.0	6.0	5.8	6.0	5.0	5.0
Total	16.5	20.0	16.7	19.3	40.6	54.1	54.1

Source: IRL

Notes: Before discounts, includes agency commission, excludes classified and production costs

General economic situation

GDP total US\$26.84 billion; GDP per capita US\$1,705 (purchasing power parity; 2002). Consumer price index 104.5 (2002).

Performance of newspapers vs. other media

Radio remained the most important medium for reaching most citizens. There were approximately two million radios in the country. Television was less pervasive but still more influential than print media. Rural radio stations must submit an application to broadcast but were exempt from paying fees. Potential commercial radio and television broadcasters must submit a licensing application and pay a fee when the application is approved. The annual licensing fees potentially were prohibitive: \$15,600 (10 million CFA francs) for radio broadcasters; \$73,000 (50 million CFA francs) for local television stations; and \$146,000 (100 million CFA francs) for national television stations. The Ministry of Communication has received more than 100 applications from potential broadcasters. Five Yaounde-based private radio stations that previously had been broadcasting illegally and submitted applications to be licensed still had not received licenses at year's end. There were several low-power, rural community radio stations funded primarily by foreign countries with extremely limited broadcast range. These stations, which broadcast educational programs to small audiences, were not allowed to discuss politics. The law permits broadcasting of foreign news services but requires the foreigners to partner with a national station. The British Broadcasting Company (BBC) and Radio France International (RFI) broadcast in partnership with state-owned CRTV. During the year, the Government continued to allow the reception of international cable and satellite television broadcasts. The state-owned CRTV broadcast on both television and radio and was the only officially recognized and fully licensed broadcaster in the country.

Performance of different types of newspapers

While approximately 60 private newspapers were published,

only an estimated 20 were published on a regular basis. The government publishes an official daily newspaper, the *Cameroon Tribune* in both French and English.

Readership

Despite the large number of newspapers in the country, the influence of print media on the average person was minimal. Circulation was low, distribution was problematic outside of Yaounde and Douala, and prices were high. Consequently, print media reached only a tiny percentage of the population, most notably the urban elite.

Media/press laws

The Penal Code's libel laws specify that defamation, abuse, contempt, and dissemination of false news are offences punishable by prison terms and heavy fines. The government frequently prosecuted its critics in the print media through criminal libel laws. These laws authorized the Government, at its discretion and request of the plaintiff, to criminalize a civil libel suit or to initiate a criminal libel suit in cases of alleged libel against the president and other high government officials.

Distribution

The Government largely ceased to interfere with private newspaper distribution or seize print runs of private newspapers.

Taxes

The communication minister announced in 2002 that equipment and consumer goods purchased for the media would be exempt from value-added tax. A ministerial communique explained that this measure was part of the government's 'communication renewal' policy. It concerns over 200 products, including paper, ink, computer equipment and telephony.

Sources: CIA – *The World Factbook 2003*; Freedom House; US State Department; BBC News; *Reporters Without Borders*

POPULATION & MORE FACTS

Population by age and sex

	All individuals		Male		Female	
	000	%	000	%	000	%
0-14	6,663	42	3,372	43	3,291	42
15+64	8,581	54	4,316	55	4,265	54
65+	502	3	228	3	274	3
Total	15,746	100	7,916	100	7,830	100

Source: CIA - *The World Factbook 2003*

Top dailies (2002)

Title	
Cameroon Tribune	Government (in French and English)
Le Messager	(in French)

Source: WAN from public sources

Commentary – CNA

There are still 102 daily newspapers in Canada; none have closed since 2001. The *Peterborough Examiner* reduced its publishing cycle on December 1st 2002, going to a six-day Monday to Saturday publishing week from a seven-day week.

In January 2003, CanWest Publications (formerly called Southam Publications) sold four dailies – the *St. Catharines, Brantford Expositor, Niagara Falls Review* and the *Welland Tribune* – to Osprey Media.

In June 2003, GTC Transcontinental purchased the independent daily Amherst Daily News, increasing their ownership from 10 to 11 dailies.

In early November 2003, Quebecor/Sun Media purchased Annex Publishing, which owned two daily newspapers in Ontario – *The Sentinel Review* in Woodstock and *The Simcoe Reformer*.

Total circulation levels declined in 2003 by 1.5% in an average day to reach 4,930,417 copies. Average weekly circulation dipped by 1.5% to reach 32,124,002 copies. Quebec was the only region to register increases, rising by 1.2% in an average day; B.C./Yukon had the highest percentage losses over 2002 (3.0% in an average day or week), while Ontario had the highest absolute loss (305,000 copies a week). The English-

language dailies registered average daily declines of 3%; the 11 French-language dailies remained stable, gaining 0.3% on an average day or week, and capturing an 18% share of the average weekly circulation market. The broadsheet dailies declined by about 2.0%; the tabloids remained relatively stable, declining by 0.6% in an average day or week. Only one out of the 10 circulation groups, ranked by size, showed increases in 2003; the other 9 registered marginal declines ranging between 1.5% and 5.0%. There are still 10 competitive newspaper markets in Canada; only two of these – Montreal and Sherbrooke – posted increases in 2003. The highly competitive Toronto market, which accounts for one-quarter of the total Canadian daily newspaper circulation, recognised a 2.5% loss in 2003, after a much larger 9.0% loss in 2002.

There are currently four free English or French daily newspapers distributed in Canada. Two are published in Toronto and two in Montreal. In Toronto, the *Toronto Metro* is co-owned by Sweden's Metro Publications and Torstar, and distributed exclusively in the transit system. The new *24 Hours* is published by Quebecor and distributed in Toronto boxes. In Montreal, the *Montreal Metropolitan* is published by Quebecor and distributed at newsstands. The *Montreal Metro* is co-published by Sweden's Metro Publications and by Transcontinental, and distributed in the transit system.

POPULATION

Population by age and sex

	All individuals (18+)		Male		Female	
	000	%	000	%	000	%
18-24	1,757	12	1,001	13	968	12
25-34	2,894	20	1,598	20	1,567	19
35-44	3,373	23	1,864	24	1,879	23
45-54	2,701	18	1,494	19	1,540	18
55-64	1,662	11	898	11	932	11
65+	2,231	15	1,046	13	1,447	17
Total	14,618	100	7,900	100	8,333	100

Source: NADbank 2002 Study

Housewives (co-habiting persons)

	Households	Housewives
	000	000
18-24	16,235	913
25-34		1,522
35-49		2,452
50-54		582
55-64		797
over 65		960
Total		7,226

Source: 2002 NADbank Study

Working population by social class and sex

	All adults		Male		Female	
	000	%	000	%	000	%
A	2,255	24	1,423	27	833	19
B	701	7	423	8	278	6
C	2,882	30	1,277	25	1,605	36
D	1,240	13	285	6	955	22
E	2,501	26	1,770	34	732	17
Total	9,580	100	5,177	100	4,402	100

Source: 2002 NADbank Study

A = management

B = professionals

C = other white collar, skilled manual workers

D = clerical, administrative or support staff

E = blue collar

Household composition

Household occupancy	Households	
	000	%
1 person	2,258	14
2 people	5,051	31
3 people	3,150	19
4 people	3,231	20
5 or more people	2,545	16
without children	11,137	69
with children	5,098	31
with children aged 0-6	2,070	13
with children aged 6-11	2,102	13
with children aged 12-17	2,489	15
Total	16,235	100

Source: 2002 NADbank Study, Interim Report

Age structure of readership

Age	% of readership	% daily reach within age group
18-24	10.1	44.9
25-34	16.7	46.4
35-49	21.9	51.5
50-54	20.7	60.0
55-64	12.9	62.3
65+	17.6	62.2

Source: 2002 NADbank Study

Newspaper reach (%)

	Daily
All adults	54.1
Men	58.9
Women	49.6

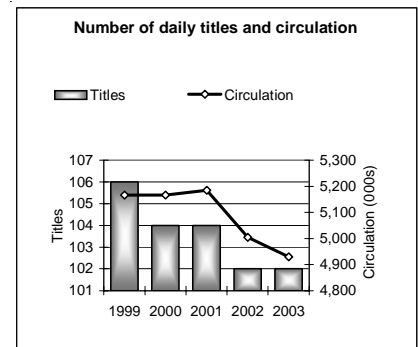
Source: 2002 NADbank Study



NUMBER OF TITLES AND CIRCULATION

	1999	2000	2001	2002	2003	Change (%)	
						99/2003	2002/03
Number of titles							
Total dailies	106	104	104	102	102	-3.77	0.00
National dailies	2	2	2	2	2	0.00	0.00
Regional dailies	104	102	102	100	100	-3.85	0.00
Circulation (000)							
Total dailies	5,166	5,167	5,185	5,005	4,930	-4.57	-1.49
National dailies	-	-	707	598	-	-	-
Regional dailies	-	-	4,477	4,407	-	-	-
Total annual sales (millions of copies)							
Dailies	1,746	1,749	1,753	1,696	1,670	-4.35	-1.56

Source: CNA



MORE FACTS

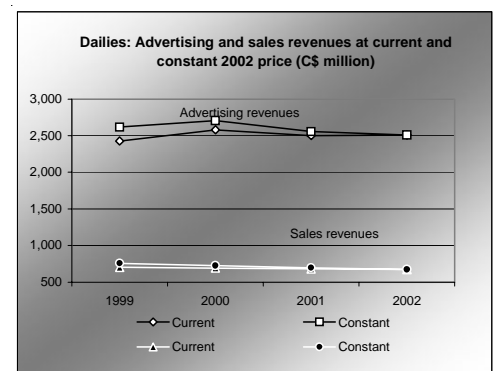
	1999	2000	2001	2002	Change (%)	
					99/2002	2001/02
Advertising revenues (C\$ million)†						
Dailies	2,429	2,580	2,501	2,510	3.35	0.36
Dailies\$	2,617	2,706	2,557	2,510	-4.07	-1.84
Sales revenues (C\$ million)*						
Dailies	703	692	682	674	-4.08	-1.11
Dailies \$	757	726	697	674	-10.97	-3.27
Volume of advertising sold (thousands of lines available)						
Dailies	-	-	1,175,433	-	-	-

Source: CNA, AC Nielsen

‡ at constant 2002 prices

† Includes classified, inserts, production costs, agency commission; after discounts

* Figures include VAT



Top ten dailies (2003)

Title	Publisher	Weekly circulation		Full page rate(C\$)	
		(000)	Format	Mono	Colour
Toronto Star	Torstar	3,293	Broadsheet	40,984	51,984
The Globe & Mail	Bell Globemedia	1,966	Broadsheet	51,678	59,491
Le Journal de Montreal	Quebecor	1,930	Tabloid	12,602	17,657
The Toronto Sun	Quebecor	1,589	Tabloid	10,602	13,175
National Post	CanWest Pub	1,503	Broadsheet	45,840	52,643
La Presse Montreal	Power	1,426	Broadsheet	24,273	28,323
The Vancouver Sun	CanWest Pub	1,171	Broadsheet	17,489	23,742
The Gazette Montreal	CanWest Pub	1,023	Broadsheet	17,199	20,433
The Province, Vancouver	CanWest Pub	996	Tabloid	7,336	10,775
Ottawa Citizen	CanWest Pub	991	Broadsheet	11,780	15,892

Source: CNA

Top ten advertising categories (2002)

Advertising sector	% of display ad revenue
Auto	20.8
Retail	19.7
Local auto dealers	11.8
Entertainment	8.5
Travel & transportation	6.8
Financial services	4.6
Telecommunications	4.3
Computers	4.0
Media	3.7
Government	1.4

Source: Nielsen Ad Expenditures 2002

Top ten advertisers (2002)

Advertiser	Newspaper expenditure C\$ (million)
Chrysler Dodge Jeep Dealers Assoc.	94.3
GM Consolidated Local Car Dealers	87.3
Chrysler Cons. Local Car Dealers	83.8
Misc. performances in Theatres	71.3
Pontiac Buick Cadillac Dealers	70.9
Chevrolet Oldsmobile Dealers	66.1
BCE Corporation	64.1
Hudsons Bay Co.	59.9
CanWest Global Communications	59.6
Government of Canada	52.4

Source: Nielsen Ad Expenditures 2002

Top ten publishing companies (2003)

Company	Weekly circulation
CanWest Publications	9,150,562
Quebecor/Sun Media	6,906,997
Torstar	4,436,535
Power Corp	2,995,435
Bell Globemedia	1,965,991
Osprey	1,991,122
Groupe GTC Transcontinental	1,002,549
FP Canadian NP Ltd.	991,342
Halifax Herald	711,495
Brunswick News	637,400

Source: CNA

Contribution of classified, retail and national advertising to total advertising lineage (%)

	2003
Classified	47.0
Retail	33.8
National	18.9

Source: CNA

Average cover prices (weekday)

	C\$
Single copy	0.80
Subscription	0.57

Source: CNA

Daily newspaper formats

	1999	2000	2001	2002	2003
Broadsheets	88	87	87	85	85
Tabloids	18	17	17	17	17

Source: CNA



ADVERTISING EXPENDITURE & ECONOMIC DATA

Advertising expenditure	(C\$ millions, in current prices)							2003	2004	2005	2006
	1996	1997	1998	1999	2000	2001	2002				
Newspapers	2,557	2,938	3,143	3,215	3,401	3,296	3,365	3,432	3,501	3,571	3,642
Magazines	375	409	451	460	514	541	558	608	642	671	698
Television	1,982	2,103	2,312	2,387	2,456	2,560	2,690				
Radio	792	856	930	964	1,014	1,062	1,103				
Cinema	8	8	8	9	11	12	14				
Outdoor	200	220	250	269	293	310	334				
Total	5,914	6,544	7,119	7,360	7,799	7,897	8,187	8,500	8,788	9,051	9,325

Source: 1996-2002 TVB, Statistics Canada, CRTC, CNA, CCNA/Les Hebdo de Quebec, Magazines Canada, ZenithOptimedia
2003-2006 ZenithOptimedia

Notes: Includes classified advertising, excludes production costs and agency commission, after discounts, magazines exclude trade titles

Main economic indicators 1996-2002

	1996	1997	1998	1999	2000	2001	2002
1 US\$= 1.40 C\$ at 2002 rate							
Gross Domestic Product (C\$ billion)							
at current prices	839	885	916	975	1,065	1,107	1,155
% change	3.3	5.5	3.5	6.5	9.2	4.0	4.3
at 2002 prices	943	979	1,004	1,051	1,117	1,132	1,155
% change	3.9	3.8	2.5	4.7	6.3	1.4	2.0
Gross Domestic Product per capita (C\$ 000)							
at current prices	28.3	29.5	30.3	32.0	34.7	35.6	37.2
at 2002 prices	31.8	32.7	33.2	34.4	36.4	36.4	37.2
Population							
Millions	29.7	30.0	30.3	30.5	30.7	31.1	31.1
Consumer Price Index							
2002=100	89.0	90.4	91.2	92.8	95.4	97.8	100.0
% change	1.6	1.6	1.0	1.7	2.7	2.6	2.2
Ad.spend as a % of GDP							
	0.70	0.74	0.78	0.75	0.73	0.71	0.71
Advertising Expenditure Growth (%)							
at current prices	5.1	10.7	8.8	3.4	6.0	1.3	3.7
at 2002 prices	3.5	8.9	7.7	1.6	3.1	-1.3	1.4

Source: IFS, ZenithOptimedia

Research

Circulation is audited by: The Audit Bureau of Circulations (ABC), CCAB

Readership is measured by: NADbank

Methodology: NADbank covers more than 65 daily newspapers in over 45 markets and carries out over 30,000 telephone interviews of adults 18+, conducted once a year from January to May.

Taxes

VAT on: sales 7% advertising 7%
newsprint 7% plant 7%
composition 7% (standard VAT rate 7%)

Other taxes on: advertising 7%

Discounts

on: post 0 rail 0 telephone 0 telegraph 0 telex 0

Ownership

Does any law exist governing publishing-house ownership, or the registration of shares in newspaper-publishing companies? Yes

Is there any law prohibiting or restricting foreign companies or individuals from owning shares, and in particular, the majority of shares, of daily newspapers? Yes, although daily newspapers receive no special treatment. The Investment Canada Act

requires a review of foreign purchases or establishments of Canadian businesses with assets greater than C\$5 million.

Is there any law prohibiting daily newspaper or periodical publishers from operating radio or television stations in the same locality? No, but the Federal Broadcasting Regulator is reluctant to grant a broadcasting licence to a company that already has daily newspapers in the same market.

So as to guarantee disclosure and transparency in the capital structure and to avert silent partnerships, is there a law or rule making it possible to determine who actually owns a publishing company? No, but some jurisdictions maintain a register of shareholders with voting powers in publicly traded companies.

Is there an antitrust law limiting concentration in the daily press? No. Publishing is dealt with by the same law as other businesses. The Federal Competition Act enables the government to obtain an enforceable order requiring divestiture, or prohibiting purchase, where ownership "prevents or lessens, or is likely to prevent or lessen, competition substantially". No order has been put on a newspaper publisher under the Federal Competition Act and so what constitutes a publisher in a "dominating position" is unspecified.

Is further regulation of media concentration expected? No

General economic situation

GDP total US\$600 million; GDP per capita US\$1,456 (purchasing power parity; 2002). Consumer price index 103 (2002).

Performance of newspapers vs. other media

There are six independent radio stations and one state-owned. One TV station is state-owned, and two others are foreign-owned. Foreign broadcasts are permitted.

Performance of different types of newspapers

There are no daily newspapers, three independent weekly newspapers and one state-owned weekly newspaper. Newspapers are in Portuguese.

Media/press laws

The law requires a formal licensing mechanism for mass media, including government authorization to broadcast; however, in 2002 there were no reports that licenses were denied or revoked or that the government refused to authorize broadcasts during the year. A 1999 constitutional amendment excludes using freedom of expression as a defence in cases involving defamation or offence to personal honour. Journalists are not required to reveal their sources. Despite the broadly interpreted criminal libel laws, no independent media outlets reported in 2002 direct pressure in their daily operations or business activities.

Sources: CIA – *The World Factbook 2003*; US State Department

POPULATION & MORE FACTS

Population by age and sex

	All individuals		Male		Female	
	000	%	000	%	000	%
0-14	169	41	85	43	84	39
15-64	216	52	104	52	112	53
65+	27	7	10	5	17	8
Total	412	100	199	100	213	100

Source: CIA - *The World Factbook 2003*

	2002
Number of titles	
Non-dailies	4

Source: US State Department

CAYMAN ISLANDS

General economic situation

GDP total US\$1.27 billion; GDP per capita US\$30,238 (purchasing power parity; 2002). Consumer price index 102.8 (2002).

Performance of newspapers vs. other media

There are two TV and three radio stations. The local TV stations compete with a vast array of U.S. and international TV programming transmitted via satellite. The government-owned Radio Cayman designs its programmes to meet the needs of education, religion, culture and entertainment.

Performance of different types of newspapers

The main newspaper, the *Caymanian Compass*, a daily, is a

responsible, respected newspaper. The *Cayman Free Press*, which publishes the daily, is owned by Hollinger Inc. The *New Caymanian* is published weekly by the Cayman Media Corporation.

Distribution

The *Miami Herald*, the *International Herald Tribune*, the *Financial Times*, and *USA Today* are on sale in Grand Cayman on the day of issue, and other newspapers can be obtained promptly.

Sources: CIA – *The World Factbook 2003*; Commonwealth Press Union; WAN from public sources

POPULATION & MORE FACTS

Population by age and sex

	All individuals		Male		Female	
	000	%	000	%	000	%
0-14	9	21	5	24	4	19
15-64	29	69	14	67	15	71
65+	4	10	2	10	2	10
Total	42	100	21	100	21	100

Source: CIA - *The World Factbook 2003*

	2002
Number of titles	
National dailies	1
Circulation (000)	
National dailies	10

Source: WAN from public sources

Top dailies (2003)

Title	Publisher	Circulation (000)	Format
Caymanian Compass	Cayman Free Press Ltd.	10	Tabloid

CENTRAL AFRICAN REPUBLIC

General economic situation

GDP total US\$4.296 billion; GDP per capita US\$1,166 (purchasing power parity; 2002). Consumer price index 103.6 (2002).

Performance of newspapers vs. other media

Radio was the most important medium of mass communication because literacy was not universal, and newspapers and television were relatively expensive and rarely found outside urban areas. The government owned and operated a radio station and a television station. The activities of the president and other senior government officials dominated programming. The directors of the national television and radio stations were members of the ruling MLPC party; broadcasts by both stations favoured the ruling party. In 2002, Radio France International (RFI) and Radio Africa Number 1 briefly went off the air following negative statements by President Patasse about RFI's coverage of events in the country. A private radio station, Africa Number One, part of a French-owned network based in Libreville, Gabon, broadcast in Bangui. Radio Notre Dame, which was owned and operated by the Catholic Church, also broadcast. The private radio station N'Deke Luka broadcast from Bangui on FM with assistance from foreign governments and development organizations. There were no privately owned stations that broadcast domestically produced national news or political commentary. The government continued to monopolize domestic television broadcasting. Private television broadcasting is allowed by law. The High Council of Communication was responsible for authorizing private television as well as radio stations, but received no applications to establish a private television station. The government did not restrict domestic receipt or distribution of satellite or cable television, but few citizens could afford it, and it was not widespread, even in the capital.

Performance of different types of newspapers

More than a dozen private newspapers were published at varying intervals; eight were published on a regular basis

during the year. *Le Citoyen* and *Le Confident* were the most widely read private daily newspapers. The government owned and controlled three newspapers, the *Centrafrique Presse*, the *Agence Centrafricaine de Presse (ACAP)* bulletin, which appeared sporadically, and *Forum de l'Unite*.

Media/press laws

The law prohibits the government from censoring the press and defines the rights and responsibilities of private media. The government continued to dominate domestic broadcast media. Libel cases were addressed in civil rather than criminal courts.

Distribution

Newspapers can be only bought in Bangui, the capital. There are only three places in Bangui selling newspapers. People living in the country see a newspaper only when somebody coming from the capital brings one with him.

Sources: CIA – *The World Factbook 2003*; US State Department

POPULATION & MORE FACTS

Population by age and sex

	All individuals		Male		Female	
	000	%	000	%	000	%
0-14	1,588	43	799	44	789	42
15-64	1,971	54	970	53	1,001	54
65+	125	3	53	3	72	4
Total	3,684	100	1,822	100	1,862	100

Source: CIA - *The World Factbook 2003*

Top dailies (2003)

Title	Circulation (000)
<i>Le Confident</i>	1
<i>Le Citoyen</i>	-
<i>L'Echo de Centrafrique</i>	-
<i>Le Democrate</i>	-
<i>L'Hirondelle</i>	-
<i>Le Quotidien de Bangui</i>	-

Source: WAN from public sources

CHAD

General economic situation

GDP total US\$9.297 billion; GDP per capita US\$1,005 (purchasing power parity; 2002). Consumer price index 106 (2002).

Performance of newspapers vs. other media

The government owns and operates the only domestic TV station *Teletchad*. A new private TV station was registered in 2001. There is one privately owned satellite TV service that distributes foreign programming in French and Arabic, but relatively few citizens can afford to subscribe to the service. A South African satellite network also sells subscriptions. Due to widespread illiteracy and the relatively high costs of newspapers and television, radio is the most important medium.

Performance of different types of newspapers

There are no daily newspapers in the country. The government controlled the newspapers *Info Tchad* and *Victoire*, and influenced *Le Progres*; however, it did not dominate the press. A number of private newspapers are published in the capital.

Media/press laws

The official media, consisting of a national radio network, a press agency, and N'Djamena's only national TV station, are

subject to both official and informal censorship. The government places limits on radio broadcasting. In 2002, it banned FM *Liberte* for three weeks, accusing it of inciting hatred. The High Council on Communication has set the licensing fee for a commercial radio station at a prohibitively high level: approximately US\$9,000 per year, 10 times the fee for radio stations owned by non-profit NGOs. However, the number of private FM stations has increased. Libel is considered a criminal offence, and those convicted have received both prison sentences and fines.

Source: CIA – *The World Factbook 2003*; US State Department; *Freedom House*

POPULATION

Population by age and sex

	All individuals		Male		Female	
	000	%	000	%	000	%
0-14	4,430	48	2,229	49	2,201	46
15-64	4,564	49	2,171	48	2,393	50
65+	259	3	106	2	153	3
Total	9,253	100	4,506	100	4,747	100

Source: CIA - *The World Factbook 2003*

Commentary – Asociación Nacional de la Prensa

Economic activity is expected to accelerate in 2004, thanks to strong private consumption, private lending and monetary expansion. The economic survey of the Central Bank and other research centres forecasts 3.5%– 4.5% growth for 2004 and 4.0%-5.0% growth for 2005. Chile's economy grew 3.3% in 2003.

Inflation was 1.1% in 2003 and is expected to be between 2% and 4% in 2004.

The free trade agreements signed with the European Union in 2002 and the United States in 2003 offer excellent prospects for trade.

The most important recent event for the press industry was the launch of the Readership and Circulation Verification

Association. This is an independent organisation that represents the main newspapers, advertising agencies and advertisers. The association will offer twice yearly reports on readership and circulation, which will be prepared by Kantar Media Research and KPMG respectively. The first was as delivered in November 2003, with the participation of six national dailies and two free dailies. During 2004 measurements at the regional level will be initiated.

For the first time this country report has official data verified by an industry-validated organisation.

The tax on corporate profits will be increased by one point, from 16% to 17%, in 2005. The National Congress is still discussing a law to protect reputation and privacy that could be a serious threat to press freedom.

POPULATION

	All individuals		Male		Female	
	000	%	000	%	000	%
0-15	3,891	26	1,983	27	1,908	25
16-24	2,483	16	1,258	17	1,225	16
25-34	2,394	16	1,189	16	1,205	16
35-44	2,366	16	1,158	16	1,208	16
45-54	1,663	11	811	11	852	11
55-64	1,103	7	527	7	576	8
65+	1,217	8	522	7	695	9
Total	15,117	100	7,448	100	7,669	100

Source: INE (National Statistical Institute) 2002

Population by social class

	Adults %
ABC1	11
C2 - C3	44
D	35
E	10
Total	100

Source: Adimark (urban only)

- A = higher managerial, administrative, professional
- B = intermediate managerial, administrative, professional
- C1 = supervisory, clerical, junior managerial
- C2 - C3 = skilled manual workers
- D = semi and unskilled manual workers
- E = subsistence, state pensioners, widows, inactive

NUMBER OF TITLES AND CIRCULATION

	1999	2000	2001	2002	2003	Change (%)	
						99/2003	2002/03
Number of titles							
Total dailies	51	53	51	47	54	5.88	14.89
National dailies	9	9	9	10	9	0.00	-10.00
Regional & local dailies	42	44	42	37	45	7.14	21.62
Non-dailies	6	9	12	12	32	433.33	166.67
National non-dailies	3	7	10	9	10	233.33	11.11
Regional & local non-dailies*	3	2	2	3	22	633.33	633.33
Sundays	1	1	1	1	2	100.00	100.00
Free papers	2	2	4	2	2	0.00	0.00
Total annual sales (millions of copies)					**		
Dailies	335	348	354	-	248	-25.97	-
Free papers	-	48	62	72	54	-	-25.00

* only those affiliated to the Chilean Newspaper Association

** only the nine dailies that were audited by KPMG

Households composition

Household occupancy	Households	
	000	%
1 person	473	11
2 people	727	18
3 people	900	22
4 people	952	23
5+ people	1,087	26
without children	1,804	44
with children	2,336	56
oldest child aged 0-3	759	18
oldest child aged 4-9	1,254	30
oldest child aged 10-14	1,294	31
Total	4,139	100

Source: INE (National Statistical Institute) 2002

Age structure of readership

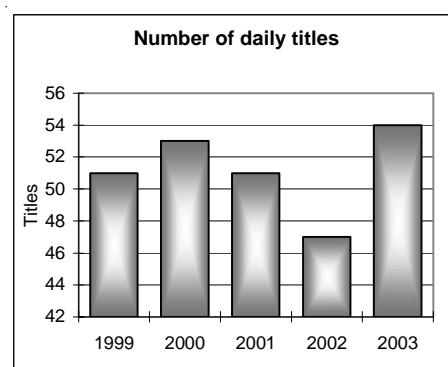
Age	% of readership	% reach within age group
0-24	29.2	42.9
25-39	30.5	42.7
40-54	25.7	44.5
55-75	14.5	41.1

Source: Kantar Media Research (KMR)

Newspaper reach (%)

	Daily
Adults (25-75)	42.9
Men (12-75)	46.5
Women (12-75)	39.0

Source: Kantar Media Research (KMR)





MORE FACTS

	1999	2000	2001	2002	2003	Change (%)	
						99/2003	2002/03
Advertising revenues (Pesos million)							
All newspapers	120,354	117,862	98,866	101,379	107,461 *	-10.71	6.00
All newspapers §	132,603	125,108	101,317	101,379	104,230 *	-21.40	2.81
Volume of advertising sold (pages & page equivalents)							
Total	-	40,944	-	-	-	-	-

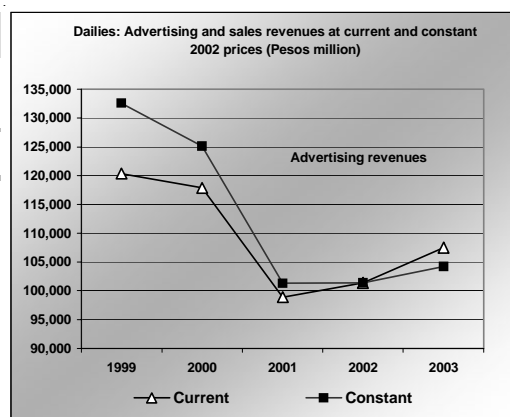
Source: ACHAP

* WAN/ZenithOptimedia estimates

§ at constant 2002 prices

Internet publishing

No of online editions	2000	2001	2002	2003
Dailies	34	36	-	38
Non-dailies	-	-	-	7
Sundays	-	-	-	1



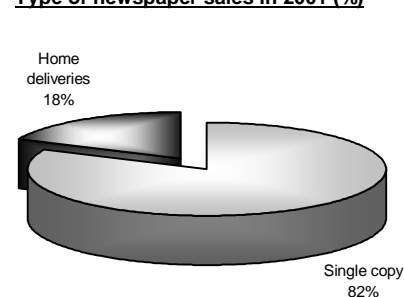
Cover prices

	Pesos
Single copy	200-450
Subscription	278

Type of newspaper sales (%)

	Single copy	Home deliveries
2001	82	18

Type of newspaper sales in 2001 (%)



Distribution costs

	1999	2000	2001	2002	2003
As % of average cover price					
Single copy sales	36	36	36	36	36

Top dailies (2003)

Title	Publisher	Circulation (000)	Readership (000)	Cover Price (weekday)		Format	Full page rate (Pesos)	
				Pesos	US\$		Mono	Colour
Las Últimas Noticias	El Mercurio S.A.P	182	400	200	0.29	Tabloid	4,339,440	4,739,563
La Tercera	Copesa	156	364	300	0.44	Tabloid	5,769,820	6,262,968
La Cuarta	Copesa	152	389	200	0.29	Tabloid	3,282,656	3,651,081
El Mercurio	El Mercurio S.A.P	149	462	300	0.44	Broadsheet	9,270,915	9,759,812
Publimetro	Metro Internacional	97	276	free	free	Tabloid	1,980,000	4,950,000
La Hora	Copesa	93	339	free	free	Tabloid	3,089,988	3,339,684
La Segunda	El Mercurio S.A.P	41	96	250	0.36	Tabloid	1,920,402	2,320,064
La Hora de la Tarde	Copesa	32	61	free	free	Tabloid	-	-

Source: AVCL, KPMG, KMR

Readership is only measured in Santiago

Top ten advertising categories (2003)

Advertising sector	% of display ad revenue
Cars	12.1
Education	6.7
Construction	6.0
Department stores	5.3
Banks	4.7
TV stations	4.0
Telecommunications	3.5
Property	1.8
Supermarkets	1.6
Airlines	1.5

Source: Mega Time

Top ten publishing companies (2003)

Publisher	Circulation (000)
El Mercurio S.A.P	182
Consortio Periodístico de Chile. Copesa	156
Metro Internacional	152
Editorial Gestión	149
Ediciones Financieras	149
El Mercurio de Valparaíso	149
Sociedad Periodística La Araucanía	97
Empresa Periodística El Norte	97
Empresa Diario El Sur	93
Empresa Periodística La Nación	93

Source: AVCL

Not ranked in any order after the first three, which are ranked by circulation

Top ten advertisers (2003)

Advertiser	% of display ad revenue
Telefónica	1.6
Falabella	1.6
Ripley	1.6
Almacenes París	1.5
Televisión Nacional de Chile	1.4
Corporación de Televisión de la U.C	1.2
Banco Santander	1.1
General Motors	1.0
Banco de Chile	0.9
Banco de Crédito en Inversiones	0.9

Source: Mega Time

Daily newspaper colour capability & formats

	1999	2000	2001	2002	2003
4-colour newspapers	41	42	42	42	76
Broadsheets	3	3	3	2	2
Tabloids	47	47	49	48	88

Employment

	2001
Total no. of Journalists	1,256



CROSS MEDIA OWNERSHIP

Owners	Regional TV	National TV	Regional Newspapers	National Newspapers	Radio
Regional TV Licensees	allowed	allowed	allowed	allowed	allowed
National TV Licensees	allowed	allowed	allowed	allowed	allowed
Regional Newspaper Owners	allowed	allowed	allowed	allowed	allowed
National Newspaper Owners	allowed	allowed	allowed	allowed	allowed
Satellite TV Broadcasters	allowed	allowed	allowed	allowed	allowed
Local radio Licensees	allowed	allowed	allowed	allowed	allowed
National radio Licensees	allowed	allowed	allowed	allowed	allowed
Foreign Investors *	allowed	allowed	allowed	allowed	allowed, if investors' country reciprocates

* the president of the company must be Chilean, and the company must remain legally Chilean

ADVERTISING EXPENDITURE & ECONOMIC DATA

Advertising expenditure (Pesos million, in current prices)

	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
Newspapers	100,676	115,706	107,219	106,197	116,498	114,693	120,293	129,170	139,998	155,394	179,241
Magazines	15,584	14,737	13,779	10,602	11,384	12,819	13,168	15,197	16,716	18,722	20,992
Television	128,628	140,405	131,609	129,081	141,472	152,475	160,153				
Radio	33,889	36,907	33,867	28,782	34,012	34,408	37,013				
Cinema	783	850	900	1,300	945	1,012	1,068				
Outdoor	19,005	20,971	19,294	19,192	22,570	21,935	24,201				
Total	298,565	329,576	306,668	295,154	326,881	337,342	355,896	379,913	417,904	468,053	538,261

Source: 1996-2002 ACHAP, Mega Time, ZenithOptimedia 2003-2006 ZenithOptimedia
 Notes: Excludes production, after discounts, includes agency commission, excludes classified

Main economic indicators 1996-2002

	1996	1997	1998	1999	2000	2001	2002
1 US\$= 688.94 Pesos at 2002 rate							
Gross Domestic Product (Pesos billion)							
at current prices	31,237	34,723	36,535	37,164	40,436	42,192	45,763
% change	20.7	11.2	5.2	1.7	8.8	4.3	8.5
at 2002 prices	39,672	41,582	41,597	40,947	42,922	43,238	45,763
% change	12.4	4.8	0.0	-1.6	4.8	0.7	5.8
Gross Domestic Product per capita (Pesos 000)							
at current prices	2,166	2,375	2,465	2,474	2,659	2,740	2,972
at 2002 prices	2,751	2,844	2,807	2,726	2,822	2,808	2,972
Population							
Millions	14.4	14.6	14.8	15.0	15.2	15.4	15.4
Consumer Price Index							
2002=100	78.7	83.5	87.8	90.8	94.2	97.6	100.0
% change	7.4	6.1	5.2	3.3	3.8	3.6	2.5
Ad.spend as a % of GDP	0.96	0.95	0.84	0.79	0.81	0.80	0.78
Advertising Expenditure Growth (%)							
at current prices	16.5	10.4	-7.0	-3.8	10.7	3.2	5.5
at 2002 prices	8.4	4.1	-11.5	-6.9	6.7	-0.4	2.9

Source: IFS, ZenithOptimedia

Research

Circulation is audited by: KPMG.

Readership is audited by: KMR (Kantar Media Research), Ipsos Search Marketing

Methodology: KMR interviews 1,000 individuals in Santiago every month, and conducts two waves of 3,000 interviews in the regions every year. Interviews are conducted face-to-face with people aged between 12 and 75.

Ipsos Search conducts 17,440 interviews a year with a representative sample of the population aged over 15 and living in the 'Gran Santiago' area. People in the A, B and C

socioeconomic categories are interviewed by phone, while people in the D category are interviewed face-to-face.

Taxes

VAT on: sales 19% advertising 19%
 newsprint 19% plant 19%
 composition 19% (standard VAT rate 19%)

There is an 19% tax on advertising and bill posting. The tax rate on profits is the same for newspapers as for other companies: 16%.

Discounts

on: post 0 rail 0 telephone 0 telegraph 0 telex 0

Ownership

Does any law exist governing publishing-house ownership, or the registration of shares in newspaper-publishing companies? No

Is there any law prohibiting or restricting foreign companies or individuals from owning shares, and in particular, the majority of shares, of domestic daily newspapers? No

Is there any law prohibiting daily newspaper or periodical publishers from operating radio or television stations in the same locality? No

So as to guarantee disclosure and transparency in the capital structure and to avert silent partnerships, is there a law or rule making it possible to determine who actually owns a publishing company? No

Is there an antitrust law limiting concentration in the daily press? No

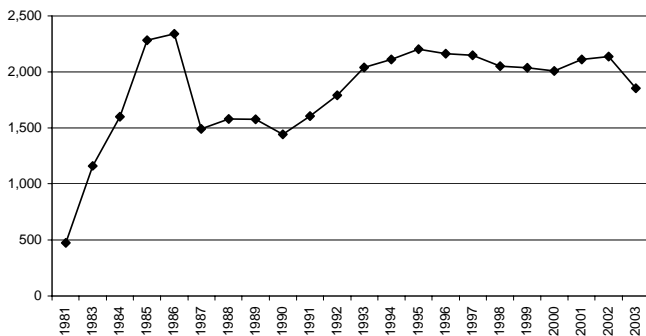
Is further regulation of media concentration expected? No

Commentary - Media Research Centre, China Education Press Agency

At the end of 2002 there were 2,137 newspapers, 9,029 magazines, 2,000 TV stations and 81 media groups around China. Since July 2003, however, China's government has drastically revised the structure of the press. This has been the fourth large-scale revision since 1980. 677 publications have been shut down, 325 have been transferred to new owners and 310 have been forced to support themselves.

The graph below demonstrates clearly that the thinning out of titles in 2003 and 2004 has been a lot less dramatic than the thinning out in 1986 and 1987. In 1986, when the General Administration of Press and Publication (GAPP) came into existence and power, there were 2,342 newspapers, which is the highest number of newspapers to exist in mainland China since the Communist Party of China (CPC) came to power in 1949. The GAPP closed down 851 newspapers across the country in 1987. The number of newspapers that remained was lower than in any subsequent year except 1990, when 134 newspapers were closed after the Tiananmen event. (The most dramatic thinning out of the press took place during Mao's Cultural Revolution between 1966 and 1970, when the number of newspapers published in China plunged from 343 to 42.)

Total number of newspaper titles (1981-2003)



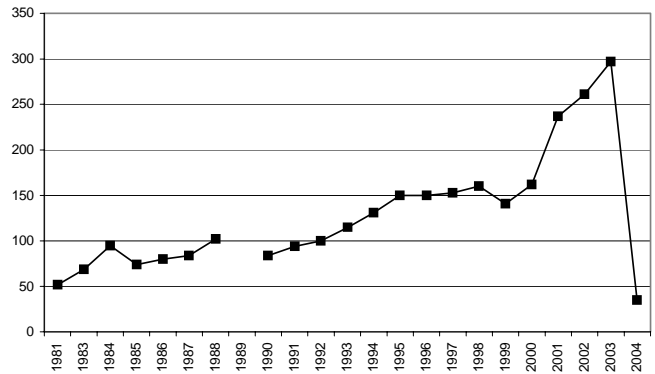
The press recovered during the first half of the 1990s, and by 1995 the number of newspapers had recovered to 2,202, the highest that has been reached since 1986. Between 1996 and 2000, however, the licences of 227 publicly distributed newspapers were cancelled, while 4,356 titles were allowed to distribute themselves within the government bureaucracy (many of these then applied to distribute themselves publicly).

During these three periods of cutbacks the county newspapers became dramatically stronger. The following two graphs illustrate this. The number of county newspapers increased from 52 in 1981 to 309 in 2003, and their total circulation increased from 1.33 million per issue in 1995 to 4.34 million in 2002. However, since July 2003 the government has carried out its fourth period of cutbacks. It has closed 677 publications, 282 of which were publicly distributed newspapers. 262 out of these 282 were county newspapers; the other 20 were organs of the government, either at the district or the provincial level.

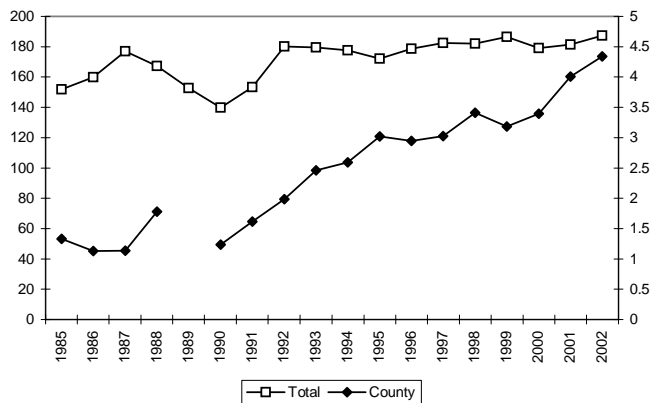
This last set of cutbacks has wrecked the county newspaper sector, profoundly changing the structure of the Chinese press and effectively removing one of the four levels of the press (national, provincial, district and county), which have existed

for more than fifty years. For example, in Hubei province in central China, the licences of all 29 county newspapers have been withdrawn. In Shandong province, 21 county newspapers have also been closed. Some county newspapers have however become county editions of prefectural-level newspapers.

Number of county newspapers



Circulation of total newspapers (left hand scale) and county newspapers (right hand scale)



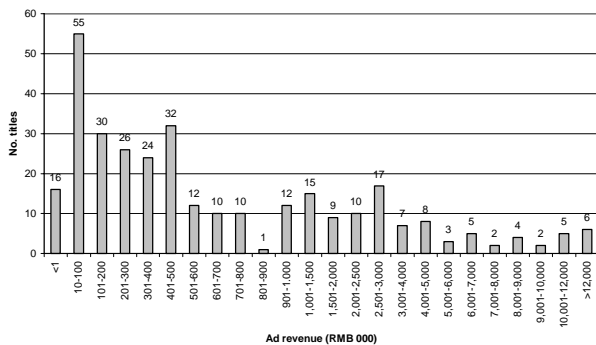
35 county newspapers have been annexed by 18 provincial or district newspaper groups. 32 of these are in three provinces: Zhejiang, Jiangsu, and Guangdong, all on the east China coast. For instance, *Leqing Daily*, *Ruian Daily*, *Dongyang Daily* and another six county newspapers now have become members of Zhejiang Daily Group. *Yuyao Daily*, *Fenghua Daily*, *Cixi Daily* and *Yinzhou Daily* are the members of Ningbo Daily Group. *Xiaoshan Daily* and *Fuyang Daily* are the members of Hangzhou Daily Group. So in Zhejiang province, more than half of the county newspapers that were published before the 2003 shake-up have survived. In the neighbour Jiangsu province, 12 county newspapers (one third of the previous total) have survived and have become the members of Xinhua Daily Group. In Guangdong, near Hong Kong, five county-newspapers (one fifth of the previous total) still exist.

The restructuring took place after the GAPP issued new rules for the newspaper industry in May 2003 (these are known as the Detail Rules Putting the No (2003) 19 Announcement of the General Office of the State Council and the General Office of Central Committee of CPC on Controlling Official



Allotment for Publications and Abating Peasants' Burden into Effect). Under these rules, county newspapers could survive if they had annual advertising revenues of more than 4 million RMB, and served an area with a population of more than 500,000 and GDP of more than 10 billion RMB. County newspapers that predated 1949 were also exempt from the cutbacks. Most of the county newspapers did not meet these conditions. Only 35 did, and among these the two largest earners of ad revenues in Zhejiang province, and the fourth-largest in Guangdong, were still shut down. The government has not explained why.

Distribution of ad revenues among country newspapers



Under the new rules national newspapers must administer their employees, finance and distribution independently from any holding company or government department, and all publications that belong to government departments at the provincial or prefectural level must be transferred to local newspaper or other media groups.

Of 325 that have been transferred to new owners, 133 are newspapers and 192 are magazines. 116 titles (70 newspapers and 46 magazines) have become the members of provincial newspaper groups, 68 titles (47 newspapers and 21 magazines) the members of prefectural newspaper groups, 68 titles (11 newspapers and 57 magazines) the members of publication groups, and 14 titles (one newspaper and 13 magazines) the members of television, radio and film groups. Of the other four newspapers, *China Industrial Economy News* has been transferred from the GAPP to *China Youth Daily* (the mouthpiece of the National Committee of the Communist Youth League), *Xinjiang Economic News* from the government to local committee of the CPC, *National Defence Time* from Sichuan Committee for Arming the People to the Sichuan Military Area of Chinese People's Liberation Army, and *Xizang (Tibet) Science & Technology News* from the Department of Science and Technology to the Tibet Association for Science and Technology.

Of 310 publications that have become independent, 50 titles are national newspapers, 75 are national magazines and 185 are local magazines. The 50 national newspapers are the organs of departments under the State Council (the Chinese cabinet). For example, *China Education Daily* was the organ of the Ministry of Education, *China Press and Publication News* the organ of the GAPP, *Farmer Daily* the organ of the Ministry of Agriculture, and so forth. These newspapers, an insider has said, will still have to obey the orders of the departments they used to represent. The relationship between the departments and the newspapers will probably not change much.

But more than 40 newspapers, a scholar noticed, are beyond trimming. For example, the mouthpieces of the military (including the *People's Liberation Army Daily*, *China Defence News*, *Air Force News*, *People's Navy News*, *Comrades in Arms News* and *Armed Police Force News*), the quasi-officials and the state-run companies (including the *Renmin Zhengxie Bao* under the Chinese People's Political Consultative Conference, *Workers' Daily* under the All China Federation of Trade Union, *Science Times* under the Chinese Academy of Sciences, *China City and Rural Finance News* under the Agriculture Bank of China), the Supreme People's Court (*People's Court Daily*) and the Supreme People's Procuratorate (*Procuratorate Daily*).

In March 2003 15 ministries were annulled, and more than 10 of their former mouthpieces were transferred to People's Daily, Economic Daily Group or other institutions. For instance, *China Chemical Industrial News*, *China Textile News*, *China Finery News* and *China Timbering News* have become the members of Economic Daily Group under the State Council, and *China Car News*, *International Finance News* and *Jinghua Times* have been affiliated to the People's Daily.

In 1981 there were 100 ministries but only 14 mouthpieces of the departments under the State Council. Since then, the number of ministries has been reduced while the number of mouthpiece newspapers has increased. 39 ministries were dissolved in 1982, 20 were dissolved in 1988 and 30 ministries were dissolved in 1998. Meanwhile, the number of mouthpiece newspapers increased to 19 in 1982, 74 in 1988 and about 150 in 1998.

The Detail Rules also command that all primary and secondary schools, all autonomous organisations at village level, and the government at small-town level must subscribe the newspapers of the CPC at all levels: the *People's Daily*, the *Economic Daily*, the *Guangming Daily*, and the *Qiushi* magazine.

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POPULATION

Population by age and sex

	All individuals		Male		Female		Households 000
	000	%	000	%	000	%	
Children	304,957	25	161,895	25	143,062	24	365,073
16-24	177,175	14	90,218	14	86,957	14	
25-34	244,916	20	125,591	20	119,325	20	
35-44	190,390	15	98,384	15	92,006	15	
45-54	148,825	12	76,744	12	72,081	12	
55-64	88,074	7	45,736	7	42,338	7	
65+	88,272	7	41,708	7	46,564	8	
Total	1,242,609	100	640,276	100	602,333	100	

Source: Communique on Major Figures of the 2000 Population Census. China Population Statistics Yearbook 2001.

Population by social class (30 cities)

	Adults		Male		Female	
	000	%	000	%	000	%
AB	5,408	11	3,499	13	1,909	8
C1	6,645	13	4,102	15	2,543	11
C2	8,661	17	4,861	18	3,800	16
D1	18,033	36	8,491	31	9,542	41
D2	7,282	14	4,096	15	3,186	14
E	4,564	9	2,448	9	2,116	9
Total	50,593	100	27,497	100	23,096	100

Source: CMMS 2002 (Spring) (30 cities)

AB = government officials, senior skilled professionals, senior managers

C1 = mid-grade skilled professionals, middle managers

C2 = junior skilled professionals, junior managers, entrepreneurs

D1 = factory/construction/service industry employees

D2 = clerks, freelance workers, housekeepers

D2 = sales, service and transport workers

E = other

Newspaper reach 2002 (%)

	Daily	Weekly	Monthly
All adults	70.9	90.2	92.3
Housewives	68.7	88.1	90.5

Source: CMMS 2002 (Spring)

Based on 30 major cities

Housewives 2001 (co-habiting persons)

	Housewives	
	000	%
under 25	7,632	2
25-34	79,518	24
35-44	88,787	26
45-54	75,061	22
55-64	46,486	14
over 65	39,028	12
Total	336,512	100

Source: Communique on Major Figures of the 2000 Population Census; China Population Statistics Yearbook 2001

Households

Occupancy	Households	
	000	%
1 person	28,099	8
2 people	67,225	18
3 people	115,678	32
4 people	84,193	23
5 or more people	69,878	19
Total	365,073	100

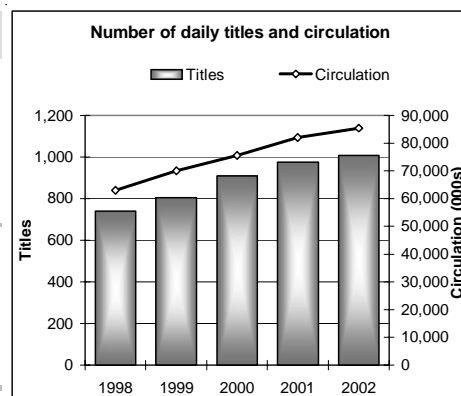
Source: China Statistical Yearbook 2003

NUMBER OF TITLES AND CIRCULATION

	1998	1999	2000	2001	2002	Change (%)	
						98/2002	2001/02
Number of titles							
Total dailies	740	805	909	975	1,007	36.08	3.28
National dailies	72	82	82	88	86	19.44	-2.27
Regional dailies *	668	723	827	887	921	37.87	3.83
Non-dailies	1,313	1,233	1,098	1,014	1,130	-13.94	11.44
National non-dailies	138	138	124	122	126	-8.70	3.28
Regional non-dailies *	1,175	1,095	974	892	1,004	-14.55	12.56
Circulation (000)							
Total dailies	62,989	70,090	75,603	82,047	85,470	35.69	4.17
National dailies	13,822	16,422	15,248	14,978	14,948	8.14	-0.20
Regional dailies *	49,167	53,668	60,355	67,068	70,522	43.43	5.15
Non-dailies	119,118	116,234	103,284	99,258	101,740	-14.59	2.50
National non-dailies	16,867	13,697	13,382	14,292	13,583	-19.47	-4.96
Regional non-dailies *	102,250	102,537	89,901	84,966	88,157	-13.78	3.76

Source: China Statistical Data Collection of Press and Publication 1999-2003

* regional includes provincial, district and county





MORE FACTS

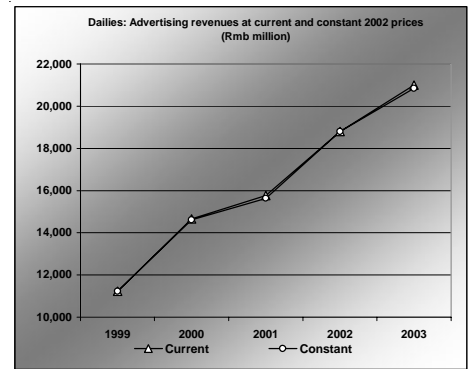
	1999	2000	2001	2002	2003	Change (%)	
						99/2003	2002/03
Advertising revenues (Rmb million)							
All newspapers	11,230	14,650	15,770	18,800	21,000	87.00	11.70
All newspapers §	11,229	14,605	15,644	18,800	20,854	85.71	10.93

§ at constant 2002 prices Before discounts (15%-30%)

Newsprint costs

	1998	1999	2001	2002
Newsprint costs (average per ton)				
RMB	5,500	5,300	5,500	5,300

Source: China Newspaper Association



Top dailies (2003)

Title	Publisher	Circulation (000)	Cover Price		Format	Full page rate (Rmb)	
			Rmb	US\$		Mono	Colour
Cankao Xiaoxi (Beijing)	Xinhua News Agency	2,670	0.40	0.05	Tabloid	200,000	-
People's Daily (Beijing)	People's Daily	1,728	0.80	0.10	Broadsheet	280,000	-
Yangtse Evening News (Nanjing)	Xinhua Daily Group	1,707	0.50	0.06	Tabloid	98,000	-
Guangzhou Daily	Guangzhou Daily Group	1,600	1.00	0.12	Broadsheet	218,230	299,290
Yangcheng Evening News (Guangzhou)	Yangcheng Evening Newspaper Group	1,300	1.00	0.12	Broadsheet	190,608	342,540
Nanfeng City News (Guangzhou)	Nanfeng Daily Group	1,170	0.78	0.09	Tabloid	191,400	254,800
Qilu Evening News (Jinan)	Dazhong Daily Group	1,150	0.60	0.07	Tabloid	78,000	109,200
Xinmin Eveing News (Shanghai)	Wenhui-Xinmin United Press Group	1,108	0.70	0.08	Tabloid	200,000	236,000
Chutian Metro Daily (Wuhan)	Hubei Daily Group	1,075	0.50	0.06	Tabloid	93,600	164,600
Beijing Evening News	Beijing Daily Group	950	0.50	0.06	Tabloid	185,300	212,900
Dahe Newspaper (Zhengzhou)	Henan Daily Group	797	0.40	0.05	Tabloid	75,000	97,500
Nanfeng Daily (Guangzhou)	Nanfeng Daily Group	750	1.00	0.12	Broadsheet	191,400	254,800
Qianjiang Evening News (Hangzhou)	Zhejiang Daily Group	720	0.55	0.07	Tabloid	105,000	-
Beijing Youth Daily	Beijing Youth Daily	666	0.80	0.10	Broadsheet	208,000	248,900
Wuhan Evening News	Changjiang Daily Group	660	0.50	0.06	Tabloid	108,000	160,000
Today Evening News (Tianjin)	Jinwan Media Development Co. Ltd	650	0.50	0.06	Broadsheet	132,000	171,600
Meiri Xinbao (Morning Post)	Tianjin Daily Group	600	0.50	0.06	Tabloid	-	-
Western China City Daily (Chengdu)	Sichuan Daily Group	600	0.50	0.06	Broadsheet	95,000	152,000
New Express (Guangzhou)	Yangcheng Evening Newspaper Group	600	0.80	0.10	Broadsheet	149,400	179,280
Modern Express (Nanjing)	Xinhua News Agency	558	0.50	0.06	Tabloid	50,000	-
Economic Daily (Beijing)	Economic Daily Group	500	0.82	0.10	Broadsheet	168,000	-
Peninsula City News (Qingdao)	Dazhong Daily Group	500	-	-	Tabloid	35,000	40,000
Chengdu Economics Daily	Chengdu Daily Group	500	0.50	0.06	Broadsheet	160,000	256,000
Shenzhen Special Zone Daily	ShenzhenNewspapers Group	495	-	-	Broadsheet	149,820	316,210
China Youth Daily (Beijing)	China Youth Daily	484	0.74	0.09	Broadsheet	130,000	150,000
Daily Sunshine	ShenzhenNewspapers Group	484	1.00	0.12	Tabloid	-	-
Yanzhao Metro Daily (Shijiazhuang)	Hebei Daily Group	483	0.40	0.05	Tabloid	72,000	100,800
Dushikuaibao (Metro Express)	Hangzhou Daily Group	480	0.50	0.06	Tabloid	120,000	180,000
Shenzhen Evening News	ShenzhenNewspapers Group	480	1.00	0.12	Tabloid	88,000	200,000
People's Liberation Army Daily (Beijing)	People's Liberation Army Daily	473	0.69	0.08	Broadsheet	120,000	-
Shenzhen Economic Daily	ShenzhenNewspapers Group	454	1.00	0.12	Broadsheet	247,500	299,500
Chinese Business View (Xi'an)	Chinese Business View	453	0.80	0.10	Broadsheet	-	-

Source: China Journalism Yearbook 2003, China Statistical Data Collection of Press and Publication 2003, 2002 Nian Baokan Jianming, Media

Top ten advertising categories (2002)

Advertising sector	% of display ad revenue
Property	11.2
Medicine	10.5
Food	10.3
Home electrical appliances	8.7
Cosmetics	7.3
Medical treatment	5.4
Cars	4.5
Spirits	3.8
Medical facilities	3.5
Dress and finery	2.7

Source: China Advertising Association

Top ten advertisers - all media (July 2003)

Advertiser	Expenditure Rmb (million)
Legend	3.8
Eachnet	2.5
Samsung Digital	2.4
IBM	1.9
Buick	1.9
Nokia	1.6
Hewlett-Packard	1.5
Acer	1.5
Loreal	1.3
Asus	1.1

Source: China Advertising Association

Media consumption (minutes per day)

	1999	2000	2001	2002
Newspapers	53.8	54.7	53.9	56.0
Magazines	24.0	24.0	-	48.0
Radio	84.0	85.8	-	55.6
Television	189.6	184	184.0	179.0
Internet	-	-	-	84.8

Source: China Press and Publishing Journal, Jan. 14, 2003; www.sinomonitor.com; www.csm.com.cn



Top publishing companies (2002)

	Annual circulation (million)	Ad revenue Rmb (million)
Shenzhen Newspapers Group	288.0	1,980.2
Guangzhou Daily Group	890.2	1,506.3
Beijing Daily Group	621.3	1,215.1
Liberation Daily Group (Shanghai)	467.6	810.4
Wenhui-Xinmin United Press Group (Shanghai)	601.7	737.2
Xinhua Daily Group (Nanjing)	950.4	566.9
Tianjin Daily Group	403.9	373.2
Dazhong Daily Group (Jinan)	884.0	350.0
Sichuan Daily Group (Chengdu)	514.7	348.0
Hubei Daily Group (Wuhan)	536.2	345.0

Source: Modern Advertising, Media

ADVERTISING EXPENDITURE & ECONOMIC DATA

Main economic indicators 1996-2002

	1996	1997	1998	1999	2000	2001	2002
1 US\$= 8.28 Rmb at 2002 rate							
Gross Domestic Product (Rmb billion)							
at current prices	6,833	7,490	7,900	8,267	8,936	9,862	10,566
% change	16.8	9.6	5.5	4.6	8.1	10.4	7.1
at 2002 prices	6,871	7,325	7,790	8,267	8,909	9,783	10,566
% change	7.0	6.6	6.3	6.1	7.8	9.8	8.0
Gross Domestic Product per capita (Rmb 000)							
at current prices	5.5	6.0	6.3	6.5	7.0	7.7	8.2
at 2002 prices	5.5	5.9	6.2	6.5	7.0	7.6	8.2
Population							
Millions	1,246	1,243	1,254	1,265	1,275	1,285	1,285
Consumer Price Index							
2002=100	99.4	102.2	101.4	100.0	100.3	100.8	100.0
% change	8.3	2.8	-0.8	-1.4	0.3	0.5	-0.8
Ad.spend as a % of GDP							
	0.31	0.36	0.39	0.42	0.44	0.43	0.50
Advertising Expenditure Growth (%)							
at current prices	26.3	27.6	14.9	11.9	14.7	7.3	23.8
at 2002 prices	16.6	24.1	15.8	13.5	14.4	6.8	17.3

Source: IFS, ZenithOptimedia

Advertising expenditure

(Rmb million, in current prices)

	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
Newspapers	7,769	9,683	10,435	11,233	14,647	15,770	18,848	22,618	26,010	28,611	31,472
Magazines	561	527	713	892	1,134	1,186	1,521	1,749	2,012	2,172	2,346
Television	9,079	11,441	13,564	15,615	16,891	17,937	23,103				
Radio	873	1,058	1,330	1,252	1,574	1,828	2,190				
Other	2,704	4,074	4,729	5,432	5,246	5,670	6,804				
Total	20,985	26,782	30,771	34,424	39,492	42,391	52,466	61,984	70,667	79,162	88,734

Source: 1996-2002 State Admin. Of Industry & Commerce, 2003-2006 ZenithOptimedia

Notes: includes classified advertising, excludes production costs and agency income, before discounts

Research

Circulation is audited by: The General Administration of Press and Publication, State Council; Global China Group Holdings Limited

Readership is measured by: Central Viewer Survey & Consulting; Institution of Public Opinion Polls, Renmin University; Horizon Market Research Co.

Taxes

VAT on: sales 13% advertising 0
 newsprint 17% plant 17%
 composition 0 (standard VAT rate 17%)

Newspaper profits are taxed at the standard rate of 33%. Advertising is generally taxed at 5%, but cultural ads are taxed at 3%; city infrastructure ads are taxed at 0.35% and education ads are taxed at 0.15%.

Discounts

on: post 0 rail 0 telephone 0 telegraph 0 telex 0

Ownership

Does any law exist governing publishing-house ownership, or the registration of shares in newspaper-publishing companies? No

Is there any law prohibiting or restricting foreign companies or individuals from owning shares, and in particular, the majority of shares, of domestic daily newspapers? According to the China's commitment to the WTO and the Catalogue for the Guidance of Foreign Investment Industries issued by three central departments (the State Development Planning Commission, the State Economy and Trade Commission and the Ministry of Foreign Trade and Economic Co-operation), foreign capital is normally excluded from the



following industries:

- publishing, producing, distributing and importing books, newspapers and periodicals;
- publishing, producing, distributing and importing audiovisual products and electronic publications;
- news agencies;
- radio stations, TV stations, and radio and TV transmission networks;
- producing, publishing, issuing and broadcasting TV programs;
- producing and distributing films;
- showing video tapes.

However, a few foreign companies have successfully invested in these industries in mainland China by forming local partnerships. For example, since 1980 the US-based International Data Group (IDG) has been a partner of China's Electronic Technology Information Institute of National Information Industry Department in jointly publishing the Computer World weekly since 1980. Now IDG is a shareholder in 22 Chinese magazines. Hachette Filipacchi Médias Group of France has published a Chinese

edition of Elle magazine with a Chinese counterpart since 1988. Vogel Burda Media of Germany publishes CHIP, a monthly, with its Chinese partner. A few magazines have successfully published Chinese editions of international titles, such as Fortune China, Popular Science China and Harvard Business Review.

Is there any law prohibiting daily newspaper or periodical publishers from operating radio or television stations in the same locality? It has been reported that a few newspaper groups have been given permission to co-operate with local radio and television stations to produce programmes.

So as to guarantee disclosure and transparency in the capital structure and to avert silent partnerships, is there a law or rule making it possible to determine who actually owns a publishing company? No

Is there an antitrust law limiting concentration in the daily press? No

Is further regulation of media concentration expected? No

COLOMBIA

Due to a lack of available data, the majority of charts in this entry have not been updated since the 2002 edition of World Press Trends. Those that have not been updated clearly state the year to which the data relates.

POPULATION & MORE FACTS

Population by age and sex (2002)

	All individuals		Male		Female		Households 000
	000	%	000	%	000	%	
0-15	15,148	34	7,271	34	7,877	34	8,780
16-24	7,738	18	3,714	18	4,024	18	
25-34	7,602	17	3,649	17	3,953	17	
35-44	5,470	12	2,626	12	2,844	12	
45-54	3,389	8	1,627	8	1,762	8	
55-64	2,502	6	1,201	6	1,301	6	
65+	2,064	5	991	5	1,073	5	
Total	43,913	100	21,079	100	22,834	100	

Source: Projections from the DANE 1993 census

Households (1999)

Occupancy	Households 000
1 person	578
2 people	1,021
3 people	1,460
4 people	1,689
5 or more people	3,712
Total	8,461

Source: DANE

Adult status (2002)

Annual income Peso 000s	All individuals		Male		Female	
	000	%	000	%	000	%
3,000+	15,148	38	7,271	38	7,877	38
1,500-2,999	7,738	20	3,714	20	4,024	20
618-1,499	7,602	19	3,649	19	3,953	19
309-618	5,470	14	2,626	14	2,844	14
under 309	3,389	9	1,627	9	1,762	9
Total	39,347	100	18,887	100	20,460	100

Source: Projections from the DANE 1993 census, TGI-EGM 2002

Age structure of readership (1999)

Age	% of readership
12-17	20.8
18-24	19.6
25-34	20.3
35-44	16.6
45-54	11.4
55-64	8.3
65+	3.1

Source: E.G.M. Estudio General de Medios 1999

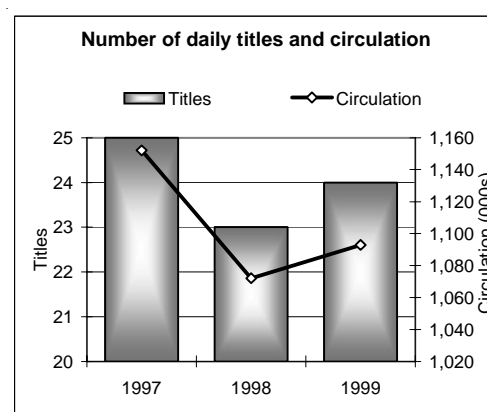
Newspaper reach (%)

	Daily	Weekly	Monthly
All adults	20	22	25
Housewives	15	17	20

NUMBER OF TITLES AND CIRCULATION

	1997	1998	1999	2000	2001	Change (%)	
						1997/99	1998/99
Number of titles							
Dailies	25	23	24	-	-	-4.00	4.35
Non-dailies	5	3	4	-	-	-20.00	33.33
Circulation (000)							
Dailies	1,152	1,072	1,093	-	-	-5.12	1.96
Non-dailies	71	33	131	-	-	84.51	296.97
Total annual sales (millions of copies)							
Dailies	406.7	386.2	398.9	-	-	-1.90	3.31
Non-dailies	3.7	3.5	8.4	-	-	128.63	140.8

Above figures refer only to newspapers affiliated to ANDIARIOS



MORE FACTS

Contribution of classified, display and insert advertising to total advertising income (%)

	1997	1998	1999
Display	75.6	82.8	74.1
Classified	18.8	12.9	18.2
Inserts	5.7	4.3	7.7

Source: ANDIARIOS

Based on 10 of the 28 member publications of ANDIARIOS

Distribution costs

	1997	1998	1999*
As % of average cover price			
Single copy sales	23.2	25.4	15.8
Home deliveries	27.3	32.6	17.7
Postal deliveries	32.6	27.1	3.2

* 1999 information based on 10 of the 28 newspapers affiliated to ANDIARIOS



	1998	1999	2000	2001	2002	Change (%)	
						98/2002	2001/02
Advertising revenues (Peso million)							
All newspapers	490,442	477,470	476,000	488,376	574,908	36.73	20.78
All newspapers §	681,976	598,748	546,458	519,314	574,908	-17.15	5.21
Sales revenues (Peso million)**							
Dailies	-	9,391	-	-	-	-	-
Dailies §	-	11,777	-	-	-	-	-
Non-dailies	-	423	-	-	-	-	-
Volume of advertising sold† (pages & page equivalents)							
Total	22,102	-	-	-	-	-	-
In colour	4,006	-	-	-	-	-	-

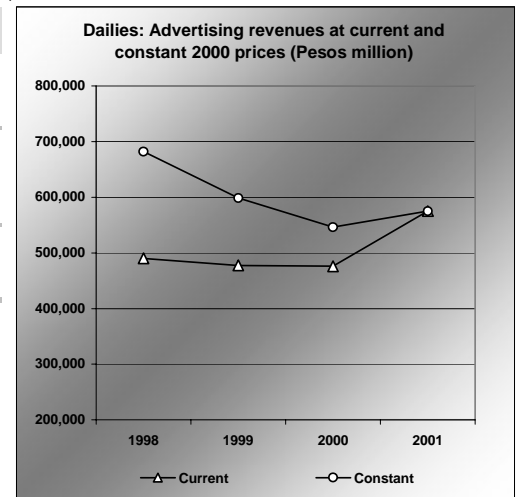
§ at constant 2001 prices Advertising revenue source: IBOPE

Before discounts. Average discount available 17.65%

*estimates

** Information based on data provided by 10 of the 28 newspapers affiliates of ANDIARIOS

† Information based on data provided by 16 newspaper affiliates of ANDIARIOS



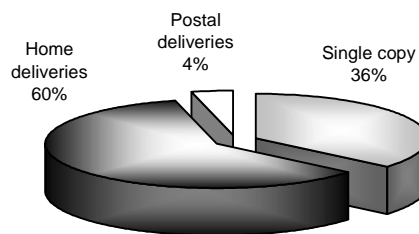
Type of newspaper sales (%)

	Single copy	Home deliveries	Postal deliveries
1997	50.5	48.3	1.2
1998	47.3	52.1	0.6
1999	36.1	60.1	3.8

Source: ANDIARIOS

Based on 10 of the 28 member publications of ANDIARIOS

Type of newspaper sales in 1999 (%)



Newspaper reach 1999 (%)

By sex	Daily	Monthly
All adults	25.4	72.6
Men	31.7	77.9
Women	20.0	68.0
By socio-economic level		
Upper class	52.6	87.4
Middle class	28.4	76.2
Lower class	15.2	61.7

Source: E.G.M. Estudio General de Medios 1999, ACIM

Top ten dailies (1999)

Title	Publisher	Circulation (000)	Readership (000)	Cover Price		Full page rate (Peso 000)		Format	Mono	Colour
				Weekday* Peso	Sunday US\$	Peso	US\$			
El Tiempo	Casa Editorial El Tiempo S.A.	281	4,662	700	0.28	1,000	0.40	Broadsheet	14,256	25,596
El Espectador	Comunican S.A.	142	1,249	700	0.28	1,000	0.40	Broadsheet	12,960	24,300
El Colombiano	El Colombiano Ltda.	110	1,297	700	0.28	1,000	0.40	Broadsheet	7,776	17,788
El País	El País S.A.	89	883	700	0.28	1,000	0.40	Broadsheet	7,776	13,446
El Heraldo	El Heraldo Ltda.	79	726	700	0.28	900	0.36	Broadsheet	8,748	19,116
La República	Editorial El Globo S.A.	55	195	700	0.28	700	0.28	Broadsheet	8,586	17,742
Vanguardia Liberal	Galvis Ramirez y Cia S.A.	50	314	700	0.28	1,000	0.40	Broadsheet	5,702	10,336
El Universal	Editora del Mar S.A.	32	427	700	0.28	1,000	0.40	Broadsheet	4,277	7,711
La Patria	Editorial La Patria S.A.	22	130	700	0.28	1,000	0.40	Broadsheet	5,735	8,910
Portafolio	Casa Editorial El Tiempo S.A.	-	489	700	0.28	-	-	Tabloid	2,495	3,920

Source: ANDIARIOS Circulation: ZenithOptimedia *cover prices vary for different days of the week but min. is Peso 700

Top ten advertising categories (2001)

Advertising sector	Expenditure Peso (Mill)
Education	37,466
Supermarkets/ food depts.	30,603
Public institutions	22,531
Retail	21,309
Property	13,600
Films	12,314
Other services	12,177
Telecoms	12,134
Corporate service	11,452
Finance	10,818

Source: IBOPE Colombia

Top ten advertisers (2001)

Advertiser	Expenditure Peso (Mill)
Cine Colombia	8,098
Almacens Exito	6,826
Dian	5,836
Cafam	5,365
Carulla y Cia.	4,916
ETB	4,410
Orbitel	3,940
Carrefour	3,911
Sofasa	3,492
Comcel	3,077

Source: IBOPE Colombia

Top publishing companies (1999)

(ranked by total circulation)

Casa Editorial El Tiempo S.A.
Comunican S.A.
El Colombiano Ltda.
El País S.A.
El Heraldo Ltda.
Editorial El Globo S.A.
Galvis Ramirez y Cia S.A.
Editora del Mar S.A.
Editorial La Patria S.A.

Online readership (no. of hits per year)

Newspaper	1997	1998	1999
El Tiempo	2,920,000	1,500,000	14,583,818
El País	264,210	-	6,480,000
El Colombiano	-	18,000	4,770,000
El Espectador	784,260	-	1,620,000
Portafolio	-	660,000	1,059,552
La República	-	14,287	750,000
El Universal	40,000	138,400	466,027
La Tarde	-	30,000	120,000
El Nuevo Dia	23,000	126,000	110,000
La Crónica	-	10,000	48,000

Source: ANDIARIOS

Figures correspond to visitors per year, except La República, which shows figures for Aug-Dec 99.

Internet publishing (No. of online editions)

	1997	1998	1999
Dailies	9	11	19
Non-dailies	1	0	0



ADVERTISING EXPENDITURE & ECONOMIC DATA

Main economic indicators 1995-2001

	1996	1997	1998	1999	2000	2001	2002
1 US\$= 2,504 Pesos at 2002 rate							
Gross Domestic Product (Peso billion)							
at current prices	100,711	121,708	140,483	151,565	173,730	187,936	202,270
% change	19.3	20.8	15.4	7.9	14.6	8.2	7.6
at 2002 prices	171,440	174,955	170,159	165,557	173,730	199,841	202,270
% change	-0.8	2.1	-2.7	-2.7	4.9	15.0	1.2
Gross Domestic Product per capita (Peso 000)							
at current prices	2,563	3,038	3,441	3,644	4,105	4,391	4,726
at 2002 prices	4,362	4,367	4,167	3,981	4,105	4,669	4,726
Population							
Millions	39.3	40.1	40.8	41.6	42.3	42.8	42.8
Consumer Price Index							
2002=100	58.7	69.6	82.6	91.5	100.0	94.0	100.0
%change	20.2	18.4	18.7	10.9	9.2	8.0	6.3
Ad.spend as a % of GDP							
	0.92	0.91	1.13	1.19	1.24	1.32	1.26
Advertising Expenditure Growth (%)							
at current prices	25.0	9.1	14.3	-7.8	0.7	4.2	-5.3
at 2002 prices	3.9	-7.9	-3.7	-16.8	-7.8	-3.5	-10.9

Source: IFS, ZenithOptimedia

Advertising expenditure

(US\$ millions, in current prices)

	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
Newspapers	236	242	227	203	203	250	232	248	263	271	279
Magazines	57	63	71	63	63	66	63	67	71	73	75
Television	472	512	636	592	598	660	619				
Radio	126	155	177	166	167	99	104				
Total	891	972	1,111	1,024	1,032	1,075	1,018	1,087	1,153	1,187	1,223

Source: 1996-2002 Ibope, 2003-2006 ZenithOptimedia

Notes: Excludes production costs and classified advertising, includes agency commission, after estimated discounts

General economic situation

GDP total US\$441 million; GDP per capita US\$697 (purchasing power parity; 2002). Consumer price index 103.5 (2002).

Performance of newspapers vs. other media

There are two national radio stations, the government-run Radio Comoros, and the oppositional Radio Tropique. In addition there are at least 10 regional and local stations. Residents also received broadcasts from Mayotte Radio, as well as from French television, without government interference. There are several private local TV stations, and satellite antennas are popular.

Performance of different types of newspapers

There are two independent daily newspapers that publish regularly, along with the semi-official weekly Al-Watwan.

Media/press laws

A new constitution adopted in 2001 provides for freedom of speech and of the press, and these rights are generally accepted. Nevertheless, journalists are occasionally sued for defamation. In an attempt to regulate the press, the state prosecutor sent newspapers a memorandum announcing the establishment of a

system of 'prior registration' of publications before they are put on sale.

Source: CIA - The World Factbook 2003; US State Department; Freedom House

POPULATION & MORE FACTS

Population by age and sex

	All individuals		Male		Female	
	000	%	000	%	000	%
0-14	271	43	136	43	135	42
15-64	343	54	169	54	174	55
65+	19	3	9	3	10	3
Total	633	100	314	100	319	100

Source: CIA - The World Factbook 2003

	2002
Number of titles	
National dailies	2

Source: WAN from public sources

Top dailies (2003)

Title
Le Matin des Comores
La Gazette des Comores

Source: WAN from public sources

CONGO, DEMOCRATIC REPUBLIC OF

General economic situation

GDP total US\$34 billion; GDP per capita US\$600 (purchasing power parity; 2002). Consumer price index 116 (2002).

Performance of newspapers vs. other media

Due to limited literacy and the high costs of newspapers and television, radio remained the most important medium of public information. The number of private radio stations in Kinshasa increased to 18 radio stations compared with 10 in 2001, of which 2 were state-owned and 16 were private or religious. There were 16 television stations compared with 7 in 2001, of which 2 were state-owned and 14 were private or religious. The government threatened to shut down radio stations that had not paid their licensing fees, however, some stations did not pay the fee, and the government took no action against them.

Performance of different types of newspapers

According to the government, 97 newspapers completed the mandatory licensing process and were authorized to publish in the country. Approximately 40 publications appeared regularly in Kinshasa in 2002; 11 were dailies and the others were published once or twice a week. There also was an active private press in Lubumbashi, and some private newspapers were published in other provincial cities. Many private news publications relied on external financing, often from political parties and individual politicians. The government published Bulletin Quotidien, an official daily that covered official and general news. For the duration of the Inter-Congolese Dialogue in Sun City, the government also published the Congo Libere, which was distributed in South Africa and the country. The Minister of Communications also published Le Journal de Vendredi, a private weekly.

Media/press laws

The 1996 Press Law prescribes death penalty for reporters convicted of disseminating false news, insulting the army, demoralizing the nation, or betraying the state in time of war. Criminal libel laws exist and were used to successfully

prosecute journalists at least once in 2002. Official harassment also includes the censoring of sensitive news broadcasts and the seizure of newspapers.

Distribution

Police in Kinshasa briefly detained newspaper vendors and seized newspapers during the year.

Source: CIA - The World Factbook 2003; US State Department; Freedom House

POPULATION & MORE FACTS

Population by age and sex

	All individuals		Male		Female	
	000	%	000	%	000	%
1-14	27,360	48	13,735	49	13,625	48
15-64	27,851	49	13,648	49	14,203	50
65+	1,414	2	583	2	831	3
Total	56,625	100	27,966	100	28,659	100

Source: CIA - The World Factbook 2003

	2001	2002	Change (%) 2001/2002
Number of titles			
Total dailies	9	11	22.22

Source: WAN from public sources

Top ten dailies (2003)

Title
Le Potentiel
L'Avenir
La Reference Plus
L'Analyste
Boyoma
Mjumbe
Le Palmares
Le Soft / Le Soft International
La Tempete des Tropiques
Alerte Plus

CONGO, REPUBLIC

General economic situation

GDP total US\$2.5 billion; GDP per capita US\$846 (purchasing power parity; 2002). Consumer price index 104 (2002).

Performance of newspapers vs. other media

Most citizens obtained their news from the broadcast media, primarily radio, which effectively remained a government monopoly. Government-owned Radio Congo and Radio Brazzaville broadcast approximately 18 hours a day. A local FM station rebroadcast Radio France International and Voice of America (VOA), and British Broadcasting Corporation (BBC) retransmissions were available. Radio and television broadcasts from neighbouring DRC were received in Brazzaville. The private independent station, Radio Liberte continued to broadcast. Local rebroadcasts of the Gabon-based Africa Number One also continued during the year 2002.

Performance of different types of newspapers

There were 15 to 20 private newspapers that appeared weekly in Brazzaville. There was no state-owned newspaper.

Circulation

The print media did not circulate widely beyond Brazzaville and Pointe Noire; however, it reached approximately two-thirds of the population.

Media/press laws

The Constitution criminalizes certain types of speech such as incitement to ethnic hatred, violence, or civil war. The

government continued to monopolize broadcast media. A 2001 amendment to the 1996 press law abolished mandatory jail sentences for defamation, although it is still possible to face prison time in cases of 'incitement to violence, racism and unrest.' The law also applies to include the Internet and business public relations operations.

Sources: CIA - The World Factbook 2003; Freedom House; US State Department; BBC News

POPULATION & MORE FACTS

Population by age and sex

	All individuals		Male		Female	
	000	%	000	%	000	%
0-14	1,133	38	570	39	563	38
15-64	1,714	58	845	58	869	58
65+	107	4	44	3	63	4
Total	2,954	100	1,459	100	1,495	100

Source: CIA - The World Factbook 2003

Top dailies (2003)

Title
Aujourd'hui
L'Eveil de Pointe-Noire
Journal de Brazzaville Mweti

Source: WAN from

public sources

COOK ISLANDS

General economic situation

GDP total US\$105 million; GDP per capita US\$5,000 (purchasing power parity; 2001). Consumer price index 103.2 (2000).

Performance of newspapers vs. other media

Television is the most popular form of media in Rarotonga island. The TV station is managed by the private company Elijah Communications Ltd, which also manages Radio Cook Islands and *The Cook Islands Herald* weekly. The editorial staff of *The Cook Islands Herald* is shared with Radio Cook Islands and Television Cook Islands. There is no cable television service in the Cook Islands. There are several privately run FM radio stations, one in Rarotonga and others in the Outer Islands.

Performance of different types of newspapers

The Cook Islands News daily and *The Cook Islands Herald* weekly are the two most influential newspapers in the Cook Islands, if only because they have comparatively wide readership on Rarotonga island. *The Cook Islands News'* main asset is that most Cook Islanders have grown up with it. It was privatized in 1989. Established in 2000, *The Cook Island Herald* has the difficult task of building readership. Another weekly newspaper, the *Cook Islands Star*, is also available on Rarotonga where its circulation is about 400 copies, but its main market area is Auckland. The bi-weekly *Cook Islands Star* is published in New Zealand and read in Cook Islands.

Media/press laws

Media is free in the Cook Islands. The lack of Freedom of Information Act could constrain media freedom in the country.

Press Council

A Cook Islands Media Council, based on the Australian and New Zealand model of press self-regulation, was established in 1995. It was created in response to a perceived threat of government-imposed regulation and functioned for four years until the threat had passed.

Sources: CIA - The World Factbook 2003; The Australian Press Council; UNESCO

POPULATION & MORE FACTS

Population by age and sex

	All individuals	
	000	%
-	-	-
Total	21	100

Source: CIA - The World

Factbook 2003

	2002
Number of titles	
Total dailies	1
<i>National dailies</i>	1
Non-dailies	2
<i>National non-dailies</i>	2

Top dailies (2003)

Title	Publisher	Circulation (000)*	Cover Price		Format	Full page rate Mono **
			CURR.	US\$		
Cook Islands News	Cook Islands News Ltd.	2	1.00	0.42	Tabloid	523

* Estimated print-run

** (New Zealand dollars)

Commentary – Grupo Nación

Inflation in 2003 was 9.87%, the second year in a row it has been lower than 10%. Production increased at a rate of 5.6%; if the High Technology Electronic Industry (especially Intel) is not considered, the rate is 4.4%.

Expenses were lower in 2003, and together with more taxes, created a situation where the deficit in terms of GDP was 1.3 points lower than the year before. Taxes created in December 2002 gave fresh money to the Government, but since they were only applicable for one year and the Government still needs money, the Executive sent in early 2003 a bill intended to bring full-scale tax reform, which is still being discussed by the Legislative Assembly. Proposals include the transformation of the sales tax to VAT. It could stay at 13% and include many other goods and services not covered at present. Income tax could also be transformed to include income from outside the country (known as 'global income'). Those who oppose the reform say it takes the burden from the rich to middle class, since the tax rate for businesses would be lowered from 30% to 18%.

The 'crawling peg' exchange rate regime, adopted since the mid 1980s, is still in use, although a liberalization attempt by the Central Bank brought down the exchange rate for a while in early 1992. After that, the rate returned to its previous level. The Central Bank has not considered changing it again

yet since a balanced budget is needed first. On the other hand, a greater inflow of capital made the deficit on the current account almost the same as 2002.

Negotiations for a free trade agreement between the USA and the five countries of Central America (CAFTA) started in January 2003. Guatemala, El Salvador, Honduras and Nicaragua concluded their negotiations with the USA in December, but Costa Rica asked for more time – since some sensitive issues needed further consideration – and agreed with American negotiators to continue talks in January 2004. (The negotiations concluded in mid-January 2004).

For 2004 the prospects are better than a year before. Our main commercial partners are expected to grow at a rate of 3.1%, internal inflation might reach the same figure as 2003, but interest rates can be higher. Petroleum prices are expected to drop.

Newspapers took 26% of total advertising revenues in 2003, down from 33% in 2002. TV also declined, so radio and other media benefited from this.

A bill proposed to the Legislative Assembly by editors of media, intended to make libel a civil offence instead of a criminal one, has not been passed yet.

POPULATION

Population by age and sex (2001)

	All individuals		Male		Female	
	000	%	000	%	000	%
Children	1,295	34	662	35	633	33
16-24	657	17	331	17	326	17
25-34	593	16	293	15	300	16
35-44	530	14	260	14	270	14
45-54	330	9	162	9	168	9
55-64	193	5	95	5	98	5
65+	214	6	101	5	113	6
Total	3,812	100	1,904	100	1,908	100

Source: INEC, Urban & Associates

Population by social class (2001)

Households	All adults		Households		
	000	%	000	%	
1,035	A + B	393	16	166	16
	C1	420	17	207	20
	C2 + D + E	1,702	68	662	64
	Total	2,515	100	1,035	100

Source: INEC, Urban & Associates

A= higher managerial, administrative, professional

B= intermediate managerial, administrative, professional

C1= supervisory/clerical/junior managerial

C2= skilled manual workers

D= semi and unskilled manual workers

E= subsistence/inactive

Age structure of readership (2000)

Age	% of readership	% weekly reach within age group
18-24	20.6	90.6
25-34	26.6	92.7
35-44	23.2	92.3
45-54	13.8	86.5
55+	15.7	85.9

Source: Urban & Associates (2000)

Note: covers Central Region only (53% of population), and does not include the lowest social level

Newspaper reach (%)

	Weekly
All adults	73.5
Men	76.3
Women	70.9

Source: Optimum Media Direction (OMD), Estudios de hábitos de audiencia, 2001

Note: covers Central Region only (53% of population), and does not include the lowest social level

Households

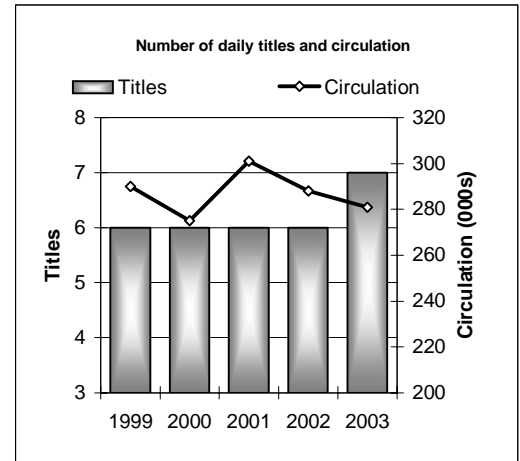
Occupancy	Households	
	000	%
1-3 people	427	41
4 people	247	24
5 or more people	361	35
	1,035	
without children	331	32
with children	704	68
with children aged 0-3	211	20
with children aged 4-9	225	22
with children aged 10-15	282	27
Total	1,035	100

Source: INEC, Urban & Associates



NUMBER OF TITLES AND CIRCULATION

	1999	2000	2001	2002	2003	Change (%)	
						99/2003	2002/03
Number of titles							
Total dailies	6	6	6	6	7	16.67	16.67
<i>National dailies</i>	6	6	6	6	6	0.00	0.00
<i>Regional dailies</i>	-	-	-	-	1	-	-
Non-dailies	27	27	22	22	29	7.41	31.82
<i>National non-dailies</i>	5	6	4	2	4	-20.00	100.00
<i>Regional non-dailies</i>	22	21	18	20	25	13.64	25.00
Free papers	2	2	-	-	-	-	-
Circulation (000)							
Total dailies	290	275	301	288	281	-3.10	-2.43
National non-dailies	138	149	159	168	-	-	-
Free papers	13	-	-	30	-	-	-
Total annual sales (millions of copies)							
Dailies	105	96	104	99	97	-7.97	-2.29



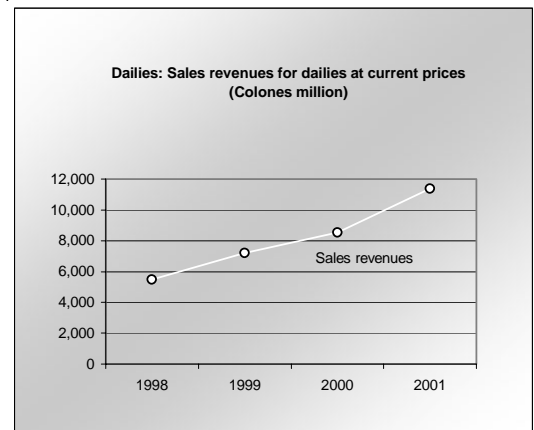
MORE FACTS

	1998	1999	2000	2001	2002	Change (%)	
						98/2001	2000/01
Sales revenues (Colones million)							
Dailies	5,500	7,200	8,532	11,400	-	107.27	33.61
Volume of advertising sold \$ (pages & page equivalents)						*	**
Total	-	17,708	18,440	14,906	18,833	6.35	26.35
Colour	-	7,032	7,109	6,315	9,640	37.09	52.65

§ La Nación and Al Día only

* Change (%) 99/2002

** Change (%) 2001/02



Cover prices

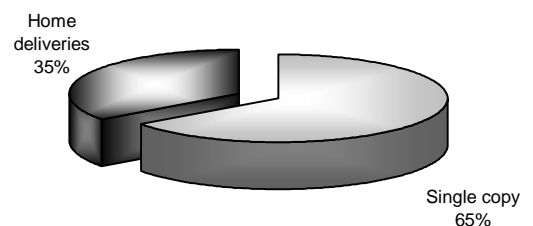
	COL
Single copy	100-175
Subscription	70-124

Type of newspaper sales (%)

	Single copy	Home deliveries
1999	75	25
2000	75	25
2001	78	22
2002	72	28
2003*	65	35

* for La Nación and Al Día only

Type of newspaper sales in 2003* (%)



Top dailies (2003)

Title	Publisher	Circulation (000)	Readership (000)	Cover Price		Format	Full page rate (COL)	
				COL	US\$		Mono	Colour
La Nación	Grupo Nación	109	862	125	0.35	Tabloid	892,000	1,472,000
Al Día	Grupo Nación	64	508	100	0.28	Tabloid	494,000	652,000
Diario Extra	Soc. Periodística Extra	-	535	150	0.42	Tabloid	525,000	787,500
La República	Editorial La Razón (Hollinger Group)	-	151	175	0.49	Tabloid	-	-
La Prensa Libre	Soc. Periodística Extra	-	55	100	0.28	Tabloid	300,000	450,000
El Heraldito	U.I.A.	-	96	100	0.28	Tabloid	-	-

Source: Grupo Nación

Online readership (page impressions)

Newspaper	1999*	2000*	2001*	2002	2003
La Nación (www.nacion.com)	1,707,214	4,577,485	7,578,660	12,304,725	13,876,751
Al Día (www.aldia.co.cr)	-	-	-	-	542,493

* average for the last three months

Note: the figures above are not independently audited

Internet publishing (No. of online editions)

	1999	2000	2001	2002	2003
Dailies	3	4	5	5	6
Non-dailies	2	3	2	2	2



Top ten advertising categories (2003)

Advertising sector	% of display ad revenue
Commerce	11.8
Education	10.0
Banking	9.7
Construction	9.5
Auto	9.3
Real estate	6.8
Public sector	4.9
Household appliances	4.9
Entertainment	3.9
Non-profit organisations	3.3

Source: Media Guru, 2004

Top ten advertisers (2003)

Advertiser	COL (mill)
INS (insurance)	955.5
Dos Pinos (dairy)	530.7
Librería Universal (department store)	414.8
Banco Popular (banking)	393.4
Corporación de Supermados Unidos (supermarkets)	357.6
Banco Nacional de Costa Rica (banking)	342.9
Almacén Casa Blanca (appliances)	290.5
ICE (electricity and telecoms)	281.4
L & S (auto)	261.0
HB Fuller (chemicals & paints)	225.3

Source: Media Guru, 2004

Top publishing companies (2003)

(ranked by total circulation)

Grupo Nación
Sociedad Periodística Extra
Editorial La Razón (Hollinger Group)
U.I.A.

Daily newspaper colour capability & formats

Number of:	1998	1999	2000	2001	2002	2003
4-colour newspapers	6	6	6	6	6	7
Tabloids	6	6	6	6	6	7

Employment

	1998	1999	2000	2001*	2002	2003*
Total no. of Journalists	400	400	-	204	-	203
Total no. of Employees	1,500	1,500	-	1,529	-	1,325
Total salary costs (COL mill)	-	375	-	-	-	-

*2001 figures are for five dailies only; 2003 figures are for La Nación, Al Día and El Heraldo only

Media consumption

minutes per day	2001	2002	2003
Newspapers (age 13+)	45.6	45.6	45.6
Radio (age 18+)	-	269.4	269.4
Television (age 18+)	-	284.3	284.3

Source: Optimum Media Direction (OMD), Estudio de Hábitos de Audiencia, 2001

TV & radio figures were conducted within Central Region (53% of national population) do not include the lowest social level

ADVERTISING EXPENDITURE & ECONOMIC DATA

Main economic indicators 1996-2002

	1996	1997	1998	1999	2000	2001	2002
1 US\$= 359.82 Colones at 2002 rate							
Gross Domestic Product (Colones billion)							
at current prices	2,460	2,984	3,625	4,513	4,918	5,388	6,076
% change	18.2	21.3	21.5	24.5	9.0	9.6	12.8
at 2002 prices	4,613	4,942	5,378	6,083	5,972	5,881	6,076
% change	22.1	7.1	8.8	13.1	-1.8	-1.5	3.3
Gross Domestic Product per capita (Colones 000)							
at current prices	724	862	1,027	1,257	1,284	1,392	-
at 2002 prices	1,357	1,428	1,524	1,695	1,559	1,520	-
Population							
Millions	3.4	3.5	3.5	3.6	3.8	3.9	-
Consumer Price Index							
2002=100	53.3	60.4	67.4	74.2	82.4	91.6	100.0
% change	17.5	13.2	11.6	10.1	11.0	2.5	9.2
Ad.spend as a % of GDP							
	1.19	1.19	1.20	1.09	1.28	1.16	-
Advertising Expenditure Growth (%)							
at current prices	-13.5	21.6	22.5	13.1	27.8	-1.1	-
at 2002 prices	-26.4	7.4	9.8	2.8	15.1	-16.4	-

Source: IFS, ZenithOptimedia

Advertising expenditure

(Colones millions, in current prices)

	1995	1996	1997	1998	1999	2000	2001	2003*
Newspapers	7,771	8,970	10,846	15,324	17,595	20,901	18,158	25,594
Magazines	9,281	1,604	1,644	1,954	1,895	2,466	3,710	9,419
Television	12,970	14,292	17,959	20,120	22,537	30,907	30,948	-
Radio	3,841	4,433	5,177	6,263	7,346	8,805	9,579	-
Total	33,862	29,299	35,627	43,661	49,373	63,079	62,395	97,390

Source: 1995-2000 Servicios Publicitarios Computadorizados, 2001 ZenithOptimedia, 2003 Media Guru

Notes: Before discounts, includes classified, excludes production costs, includes agency commission

* Magazines figure for 2003 includes outdoor and others



Research

Circulation is audited by: ERNST & YOUNG for La Nación and Al Día

Readership is measured by: Urban & Associates for La Nación and Al Día, Unimer Research Intl. for La Nación and Al Día, Optimum Media Direction for La Nación and Al Día

Taxes

VAT on: sales 0 advertising 13%
newsprint 0 (standard VAT rate 13%)

There is a 1% Journalists Association stamp tax on revenue. All companies are subject to 30% tax on profits.

Discounts

on: post 0 rail 0 phone 0 telegraph 0 telex 0

Ownership

Does any law exist governing publishing house ownership, or the registration of shares in newspaper publishing companies? No

Is there any law prohibiting or restricting foreign companies or individuals from owning shares, and in particular, the majority of shares, of domestic daily newspapers? The law that requires media companies to publish the names of their shareholders once a year used to have a provision that prevented foreigners from

owning newspapers and radio and TV stations. But some years ago this provision was declared unconstitutional.

Is there any law prohibiting daily newspaper or periodical publishers from operating radio or television stations in the same locality? No

So as to guarantee disclosure and transparency in the capital structure and to avert silent partnerships, is there a law or rule making it possible to determine who actually owns a publishing company? Media companies are required to publish the names of their owners or shareholders once a year.

Is there an antitrust law limiting concentration in the daily press? The 'Law for Promoting Competition and the Defence of Consumers', passed in 1994, forbids monopolies, with a few exceptions under government control. Concentration is considered a monopolistic practice, and therefore illegal, when:

- one company has the power to fix prices
- one company has the power to substantially restrain supply
- there are entry barriers that prevent other companies from supplying the market
- one company has special access to raw materials.

Is further regulation of media concentration expected? No

Commentary - Zagreb University

The general economic situation is not favourable to the newspaper industry. Publishers asked the government to reduce VAT, because daily newspapers' cover price of 6 kuna is too high; they argued that a reduction in VAT would only benefit newspaper readers, not publishers. The Social-Democratic Party accepted this initiative as a part of its electoral campaign, but it lost the elections.

After great pressure from the Catholic Church the government decided to close shops on Sunday, which has made it much harder to sell Sunday editions of newspapers. Some newspapers, such as *Jutarnji list*, had invested a lot in developing their Sunday editions, but now, after the shops have closed, selling Sunday newspapers on a reduced number of newsstands is no longer profitable. Some newspapers are planning to reduce the size of their Sunday editions or even close them.

Freelancers have lost their benefits and government is forcing them to pay higher taxes. Most of the freelancers are essentially unemployed journalists; their social security is being jeopardised.

The only morning newspaper – *Vjesnik* – is maintaining a high standard of journalism, but because it is owned by the government it cannot be expected to scrutinise the government too closely. The evening newspapers *Večernji list* and *Jutarnji list* are each competing to be faster, better and more sensational than the other. *Večernji list* changed its lay-out under the influence of its Austrian owners and is now similar to their *Kleine Zeitung*. *Novi list* has formed a news pool with local dailies such as *Glas Slavonije*, *Zadarski list*, *Karlovački list* and *Glas Istre*. The pool provides all these newspapers with a better selection of interesting news from all over country.

In March 2004 Europa Press Holding – the biggest publishing company – announced that it planned to launch a new daily newspaper called *Daily*. It intends *Daily* to be a serious business and political newspaper, based on the weekly magazine *Business Week*.

Advertising expenditure is increasing, which is a sign of economic growth, or at least of growing understanding of the importance of advertising. Media research companies report a 36% increase in 2003. Television is still the most important medium for advertisers (with 60% of total expenditure). Publishers are now the leading advertisers:

Europa Press Holding publishing company is the largest print advertiser, ahead of even the telecommunications companies.

Newspaper circulations are still declining. Newspapers are too expensive: a daily newspaper costs 6 kuna, but one can buy a coffee in a pub for 5 kuna and read a newspaper there for free. The level of education in Croatia is low, and the average citizen is losing the habit of reading.

The internet is still growing rapidly. The number of internet users has increased to 850,000; this has encouraged several non-daily newspapers to launch online editions.

Online media generally do not respect copyright very much. Online journalists sometimes rewrite news reports from several sources and publishing them as original research. Newspapers, radio and television news often report unsubstantiated news that first appeared on the internet.

The new set of media laws regulated very strictly the transparency of all data on ownership and investment, and limited cross-ownership and concentration. Unfortunately, the new government decided to revise all the new media laws.

In 2003 the Croatian Parliament adopted the following laws: The Law on the Media, The Law on Electronic Media, The Law on Croatian Radio-Television, The Law on the Right to Access Information, and provisions of the Penal Code, which stipulate criminal offences from the field of the media, namely, public information. Then in December the new Government announced how most of these laws should be revised. The means that Croatia has new laws but no one is paying attention to them while they are being revised.

The largest newspaper distributor – *Tisak* – has been privatised. The two largest newspaper publishers – *Europa Press Holding* and *Večernji list* – own 25% each, as does the tobacco factory Rovinj. The remaining 25% is owned by several small shareholders.

Several journalists and media owners have been exposed to car bombs and shootings. No attacker has been ever identified. Reporters Sans Frontiers has given Croatia a very bad report on its media freedom, because of these attacks and proposed changes to the Penal Code. Croatia shared 69th rank in the world for media freedom with Tanzania.

POPULATION

Population by age and sex

	All individuals		Male		Female		Households 000
	000	%	000	%	000	%	
Children	755	17	386	18	369	16	1,477
16-24	604	14	308	14	296	13	
25-34	589	13	296	14	293	13	
35-44	651	15	325	15	326	14	
45-54	633	14	316	15	317	14	
55-64	491	11	229	11	262	11	
65+	711	16	273	13	438	19	
Total	4,434	100	2,133	100	2,301	100	

Source: Central Bureau of Statistics, Census of Population, Households and Dwellings, 2001

Age structure of readership

Age	% of readership	% reach within age group
12-19	6.7	23.7
20-34	17.5	32.0
35-49	23.9	39.6
50-64	28.2	58.1
65+	23.7	56.0

Source: Media Metar



Adult population by social class and sex

	All adults		Male		Female	
	000	%	000	%	000	%
A+B	438	12	230	13	208	11
C1	730	20	291	17	439	23
C2	1,003	27	665	38	338	17
D	801	22	342	20	459	24
E	710	19	221	13	489	25
Total	3,682	100	1,749	100	1,933	100

Source: Central Bureau of Statistics, Census of Population, Households and Dwellings, 2001

A= higher managerial, administrative, professional

B= intermediate managerial, administrative, professional

C1= supervisory/clerical/junior managerial

C2= skilled manual workers

D= semi and unskilled manual workers

E= subsistence/state pensioners or widows

Newspaper reach (%)

	Daily
All adults	55
Men	48
Women	42
MHS	75

Source: Media Metar

MHS=Main household shopper

Households

Occupancy	Households 000
1 person	307
2 people	349
3 people	280
4 people	304
5 or more people	237
without children	563
with children	914
with children aged 0-5	264
with children aged 6-9	179
with children aged 10-14	237
Total	1,477

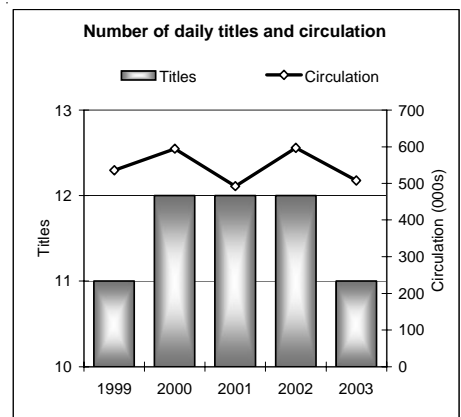
Source: Statistical Yearbook of the Republic of Croatia

NUMBER OF TITLES AND CIRCULATION

	1999	2000	2001	2002	2003	Change (%)	
						99/2003	2002/03
Number of titles							
Total dailies	11	12	12	12	11	0.00	-8.33
National dailies	6	9	7	7	6	0.00	-14.29
Regional dailies	3	1	2	5	5	66.67	0.00
Local dailies	2	2	3	0	0	-	-
Non-dailies	237	245	174	181	202	†	11.60
National non-dailies	59	64	107	105	110	†	4.76
Regional & local non-dailies	178	181	67	76	17	†	-77.63
Free non-dailies	-	-	-	-	75	†	-
Regional & local Sundays	-	-	-	-	5	†	-
Circulation (000)							
Total dailies	536	595	493	597	508	-5.24	-14.91
National dailies	495	545	456	562	476	-3.76	-15.30
Regional dailies	33	38	32	35	32	-3.03	-8.57
Local dailies	9	12	5	0	0	-	-
Non-dailies	624	653	1,969	2,190	1,985	†	-9.36
National non-dailies	411	423	1,873	2,030	1,820	†	-10.34
Regional & local non-dailies	213	230	96	160	55	†	-65.63
Free non-dailies	-	-	-	-	110	†	-
Total annual sales (millions of copies)							
Dailies	159	163	173	214	182	14.32	-15.11
National dailies	-	-	-	-	171	-	-
Regional dailies	-	-	-	-	11	-	-
Non-dailies	35	36	58	92	99	†	7.38

Source: Croatian Journalists Association, Research Institute estimates

† Note: The definition of non-dailies changed in 2001, and figures from 2001 onwards are not comparable with figures from previous years



MORE FACTS

Employment

	2001	2002	2003
Total no. of journalists *	1,200	1,300	3,334
Part-time journalists	-	-	572
Total no. of employees	-	-	4,918

Source: Croatian Journalists Association

* members of the Croatian Journalists Association

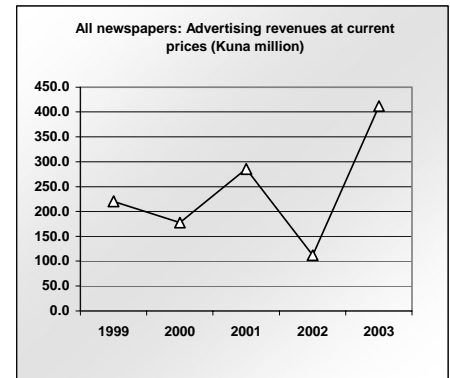
Cover prices

	Kuna
Single copy	6
Subscription	6



	1999	2000	2001	2002	2003	Change (%)	
						99/2003	2002/03
Advertising revenues (Kuna million)							
All newspapers*	220.2	177.4	285.3	111.7	412.0	87.10	268.85
Sales revenues (Kuna million)							
Dailies	-	-	992	1,286	1,096	-	-14.79
National dailies	-	-	-	-	1,028	-	-
Regional dailies	-	-	-	-	68	-	-
Non-dailies	-	-	873	-	1,125	-	-
National non-dailies	-	-	-	-	1,092	-	-
Regional & local non-dailies	-	-	-	-	33	-	-
Volume of advertising sold (number of ads)							
National dailies	72,538	-	-	-	-	-	-
National non-dailies	9,257	-	-	-	-	-	-
Regional newspapers	39,607	-	-	-	-	-	-
Monthly magazines	15,859	-	-	-	-	-	-

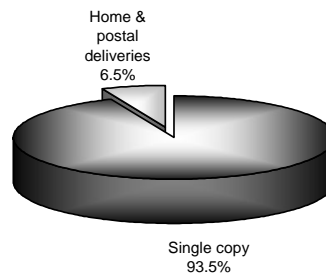
* National and regional newspapers in 2003; only regional newspapers in previous years



Type of newspaper sales (%)

	Single copy	Home deliveries	Postal deliveries
1999	93.5	1.6	4.9
2000	93.2	1.7	5.1
2001	92.0	5.0	3.0
2002	93.0	5.0	2.0
2003	93.5		6.5

Type of newspaper sales in 2003 (%)



Distribution and newsprint costs

	1998	1999	2000	2001	2002
As % of average cover price					
Single copy sales	31	32	31	31	31
Home deliveries *	-	-	24	24	24
Postal deliveries *	21	24	28	28	28
Average distribution cost per copy					
Subscription	Kuna	-	-	1.68	1.68
Single copy	Kuna	-	-	1.68	1.68

* consumers pay the additional costs for home & postal deliveries

Top ten advertising categories (2003)

Advertising sector	% display ad revenue
Newspapers/magazines	25.1
Telecommunications	11.9
Cars	11.3
Finance	10.8
Retail	3.3
Institutional advertising	2.3
Interior design shops	2.1
Computer science	1.7
Casinos/lotteries	1.7
Construction	1.6

Source: Mediana Fides

Top ten publishing companies (2003)

Europapress Holding
Vecernji List
Sanoma Magazines
Slobodna Dalmacija
Novi List
Glas Koncila
Hit Press Kiosk
Glas Slavonije
Glas Istre
Nakladnik D.O.O.

Top ten advertisers (2003)

Advertiser	Newspaper expenditure Kuna
Europapress Holding	56,886,186
Ht Mobile	34,432,861
Vecernji List	32,367,024
VIP Net	27,457,573
Zagrebacka Banka	12,907,873
PZ Auto	12,530,568
Slobodna Dalmacija	12,438,497
Hrvatski Telekom	10,717,649
Novi List	9,701,588
Beiersdorf	8,315,945

Source: Mediana Fides

Top ten dailies (2003)

Title	Publisher	Circulation (000)	Readership (000)	Cover Price		Format (cm)	Full page rate (Kuna)	
				Kuna	US\$		Mono	Colour
Vecernji List	Vecernji List	186	598	6.00	0.76	42 x 29	25,000	30,000
Jutarnji List	EPH	158	506	6.00	0.76	42 x 29	22,000	26,400
Slobodna Dalmacija	Slobodna Dalmacija	59	191	6.00	0.76	38.5 x 26.6	17,000	-
Novi List	Novi List	39	126	6.00	0.76	38 x 26	15,000	18,000
Sportske Novosti	EPH	25	83	6.00	0.76	25.5 x 38.5	9,240	11,100
Glas Slavonije	Glas Slavonije	15	49	6.00	0.76	39 x 28.5	7,400	10,400
Glas Istre	Glas Istre	12	40	6.00	0.76	38 x 26	12,000	14,400
Vjesnik	Vjesnik	9	30	6.00	0.76	50 x 32	10,000	-
Zadarski List	Zadarski List	2	7	6.00	0.76	26.5 x 37.5	2,400	3,120
Karlovački List	Karlovački List	2	4	6.00	0.76	38 x 26	2,400	-

Source: Media Metar/ICEJ estimates



Daily newspaper colour capability & formats

Number of:	1999	2000	2001	2002	2003
4-colour newspapers	6	8	12	11	11
Broadsheets	1	1	1	1	1
Tabloids	10	11	11	10	10

Media consumption (minutes per day)

	1999	2000	2001	2002	2003
Newspapers	17	20	19	15	15
National newspapers	8	11	9	7	8
Regional & local newspapers	9	9	10	8	7
Magazines	13	16	14	15	17
Radio	175	193	205	209	218
Television	125	130	149	152	168
Internet	12	19	23	28	35

Source: Media Metar

Internet publishing (no. of online editions)

	1999	2000	2001	2002	2003
Dailies	4	12	5	5	5
Non-dailies	-	-	-	-	21

Online readership (page impressions per month)

		2000	2001	2002	2003 *
Večernji List	www.vecernji-list.com	640,000	950,000	750,000	450,000
Vjesnik	www.vjesnik.hr	1,675,000	1,500,000	210,000	300,000
Slobodna Dalmacija	www.slobodna-dalmacija.hr	-	450,000	360,000	255,000
Novi List	www.novolist.hr	-	-	150,000	240,000
Glas Slavonije	www.glas-slavonije.hr	-	-	120,000	150,000

Source: Publishers

* 2003 data not comparable with previous data

CROSS MEDIA OWNERSHIP

Owners	Regional TV	National TV	Regional Newspapers	National Newspapers	Radio
Regional TV Licensees	Maximum 25% stake	Maximum 25% stake	Maximum 10% stake if circulation exceeds 3,000	Maximum 10% stake if circulation exceeds 3,000	Maximum 25% stake
National TV Licensees	Maximum 25% stake	Maximum 25% stake	Maximum 10% stake if circulation exceeds 3,000	Maximum 10% stake if circulation exceeds 3,000	Maximum 25% stake
Regional Newspaper Owners	Not allowed if circulation exceeds 3,000	No restrictions	Not allowed if circulation exceeds 3,000	-	Not allowed if circulation exceeds 3,000
National Newspaper Owners	Not allowed if circulation exceeds 3,000			Not allowed if combined circulation exceeds 40% of total market circulation	Not allowed if circulation exceeds 3,000
Satellite TV Broadcasters	Not regulated	Not regulated	Not regulated	Not regulated	Not regulated
Foreign Investors	No special restrictions	No special restrictions	No special restrictions	No special restrictions	No special restrictions

ADVERTISING EXPENDITURE & ECONOMIC DATA

Advertising expenditure (Kuna million)

	2003
Newspapers	412
Magazines	398
Television	1,801
Radio	183
Outdoor	218
Total	3,012

Source: Media Net

**Main economic indicators 1996-2002**

	1996	1997	1998	1999	2000	2001	2002
1 US\$=	7.87	Kuna at 2002 rate					
Gross Domestic Product (Kuna billion)							
at current prices	108.0	123.8	137.6	141.6	157.5	162.9	-
% change	9.8	14.7	11.1	2.9	11.3	3.4	-
at 2002 prices	139.2	153.2	160.1	158.8	168.3	166.1	-
% change	5.2	10.1	4.5	-0.8	6.0	-1.3	-
Gross Domestic Product per capita (Kuna 000)							
at current prices	24.0	27.1	30.6	31.1	36.0	35.0	-
at 2002 prices	31.0	33.5	35.6	34.9	38.4	35.6	-
Population							
Millions	4.5	4.6	4.5	4.6	4.4	4.7	4.7
Consumer Price Index							
2002=100	77.6	80.8	86.0	89.2	93.6	98.1	100.0
% change	4.3	4.2	6.4	3.7	5.0	4.8	2.0

Source: IFS, ZenithOptimedia

Research

Circulation is audited by: No official source. Figures in this report were based on data from independent research agencies, the Zagreb University Faculty of Political Sciences and the ICEJ (International Centre for the Education of Journalists).

Readership is measured by: GfK, Media Metar, Media Net, Mediana Fides, Puls

Taxes

VAT on: sales 22% advertising 22%
newsprint 22% plant 22%
composition 22% (standard VAT rate 22%)

The tax rate on profits for newspapers is 20%, which is the same as for other companies. Newspapers receive no special tax concessions.

Subsidies

Subsidies are generally not available, but in December 2003 the Croatian government spent Kuna 33.5 million purchasing a printing rotary for *Vjesnik*, which the government owns.

Discounts

on: post 0 rail 0 telephone 0 telegraph 0 telex 0

Ownership

Does any law exist governing publishing-house ownership, or the registration of shares in newspaper-publishing companies? Yes. The Law of Public Information (1996), the First Law on Transformation of Socially Owned Enterprises, and the recent Privatisation Act.

Is there any law prohibiting or restricting foreign companies or individuals from owning shares, and in particular, the majority of shares, of domestic daily newspapers? No. There are equal rights for domestic and foreign companies.

Is there any law prohibiting daily newspaper or periodical publishers from operating radio or television stations in the same locality? Yes. Under the Law on Electronic Media, a company with a national broadcasting licence may not publish any daily newspaper with a circulation of more than 3,000, and may not own more than: 25% of a national, regional or local publisher; 10% of any publisher of daily newspapers with circulation exceeding 3,000; or 10% of a news agency. A company with a regional or local broadcasting licence may not publish daily newspapers in the same or neighbouring region, and may own more than 30% of a publisher that produces newspapers in the same region.

So as to guarantee disclosure and transparency in the capital structure and to avert silent partnerships, is there a law or rule making it possible to determine who actually owns a publishing company? Each media company must tell the government who owns its shares directly or indirectly, and how many shares they own.

Is there an antitrust law limiting concentration in the daily press? Article 33 of the Law on Media states that no publisher of daily or weekly newspapers may sell more than 40% of all dailies and weeklies sold in the relevant market.

Is further regulation of media concentration expected? The new government started the process of altering media laws in December 2003; it is expected to change the regulation of media concentration.

General economic situation

GDP total US\$30.69 billion; GDP per capita US\$2,725 (purchasing power parity; 2002). Consumer price index 107.1 (2002).

Performance of newspapers vs. other media

All media are dependent on the state both for funding and for the right to operate. All legal media must operate under party guidelines and reflect government views. The Communist Party controlled all media except for a few small church-run publications. Even the church-run publications, denied access to mass printing equipment, were subject to governmental pressure.

Performance of different types of newspapers

The government controls all media outlets in the country including the main daily newspaper Granma, which serves as an official mouthpiece. Granma Internacional's online version is available in five languages other than Spanish, including English, French, Portuguese, German, and Italian. There are three other national dailies and 14 regional dailies, one in each region.

Online/digital publishing

Cubans will soon be able to surf the Internet from the comfort of their own homes. The connection, from Cuban service provider E.net, will cost 8 cents per minute in a country where the average worker earns less than \$15 a month. Previously, only artists and employees of government offices, hospitals, universities, research centres, state-run media, writers, unions and foreign companies could legally browse the Web. While E.net's offering increases the number of possible connection sites, critics say the high cost of the connection ensures that few Cubans will benefit from it. Most Cubans wait in long lines to access the Internet at cyber cafés and the Cuban Postal Service, where they pay \$4.50 for three hours of access to e-mail and select Cuban Web sites. Communications Minister Ignacio Gonzalez said the regulation was necessary to ensure widespread access to technology in the developing country. The government cracked down on unauthorized connections in 2003 in response to the black market sale of stolen or borrowed login names and passwords.

Ownership

The Constitution states that print and electronic media are state property and can never become private property.

Media/press laws

In law and in practice, the government did not allow criticism of the revolution or its leaders. Laws against antigovernment propaganda, graffiti, and disrespect of officials impose penalties between 3 months and 1 year in prison. If President Castro or members of the National Assembly of People's Power (ANPP) or Council of State were the objects of criticism, the sentence could be extended to 3 years. Charges of disseminating enemy propaganda, which included merely expressing opinions at odds with those of the government, could bring sentences of up to 14 years. In the government's view, such materials as the Universal Declaration of Human Rights, international reports of human rights violations, and mainstream foreign newspapers and magazines constituted enemy propaganda. The government continued to subject independent journalists to internal travel bans; arbitrary and periodic detentions (overnight or longer); harassment of family and friends; seizures of computers, office, and photographic equipment; and repeated threats of prolonged imprisonment. Typewriters must be registered and owning a fax machine or photocopier without authorisation is punishable by imprisonment. The purchase of personal computers by private citizens is forbidden.

Distribution

Citizens did not have the right to receive publications from abroad, although news stands in hotels for foreigners and certain hard currency stores sold foreign newspapers and magazines.

Journalists

The country's 100-odd independent journalists, who work for some 20 independent news agencies not recognised by the authorities, are not allowed to publish or broadcast in Cuba and are forced to send their articles by telephone or fax to the United States for use in foreign publications or on the Internet. An estimated 50 independent journalists have left the island since 1995.

Sources: CIA - The World Factbook 2003; Reuters; US State Department; Freedom House

POPULATION & MORE FACTS

Population by age and sex

	All individuals		Male		Female	
	000	%	000	%	000	%
0-14	2,267	20	1,164	21	1,103	20
15-64	7,843	70	3,933	70	3,910	69
65+	1,154	10	532	9	622	11
Total	11,264	100	5,629	100	5,635	100

Source: CIA - The World Factbook 2003

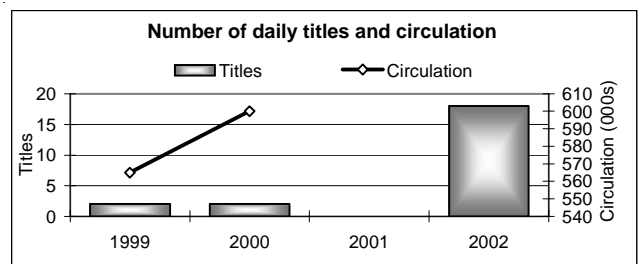
Top dailies (2003)

Title	Publisher
Granma	Central Committee of the Communist Party
Juventud Rebelde	-
Trabajadores	Centre of Cuban Workers
Nueva Prensa Cubana	-

Source: WAN from public sources

	1999	2000	2001	2002	Change (%)	
					1999/2002	2001/2002
Number of titles						
Total dailies	2	2	-	18	800.00	-
National dailies				4	-	-
Regional dailies				14	-	-
Non-dailies	31	31	-	-	-	-
Circulation (000)						
Total dailies	565	600	-	-	-	-
Non-dailies	912	923	-	-	-	-

Source: UNESCO; WAN from public sources



Due to a lack of available data, the majority of charts in this entry have not been updated since the 2002 edition of World Press Trends. Those that have not been updated clearly state the year to which the data relates.

POPULATION

Population by age and sex (1996)

	All individuals		Male		Female	
	000	%	000	%	000	%
Children	160	25	83	26	77	24
15-24	93	14	47	15	46	14
25-34	96	15	49	15	48	15
35-44	96	15	49	15	48	15
45-54	78	12	39	12	39	12
55-64	55	8	26	8	29	9
65+	73	11	32	10	41	12
Total	652	100	325	100	327	100

Source: Demographic Report 1996

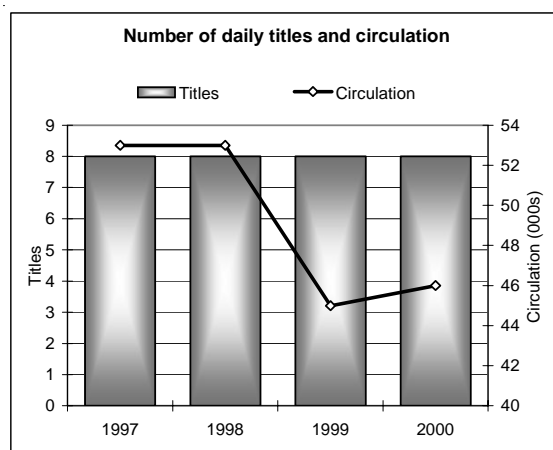
Households (1992)

Occupancy	Households 000
1 person	23
2 people	46
3 people	32
4 people	47
5 or more people	36
without children	95
with children	90
Total	186

Source: Census of population 1992

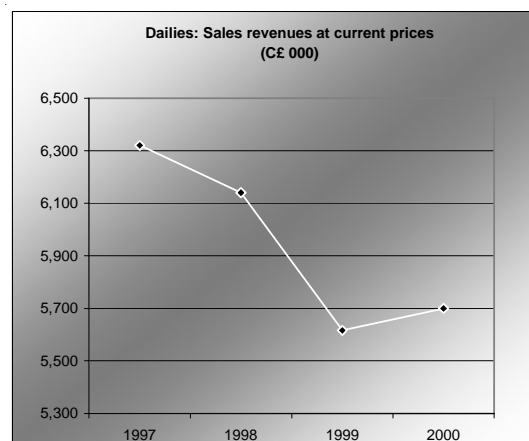
NUMBER OF TITLES AND CIRCULATION

	1997	1998	1999	2000	2001	Change (%)	
						97/2000	99/2000
Number of titles							
Total dailies	8	8	8	8	-	0.00	0.00
Non-dailies	7	7	10	10	-	42.86	0.00
Sundays	9	6	7	7	-	-22.22	0.00
Circulation (000)							
Total dailies	53	53	45	46	-	-13.21	2.22
Non-dailies	33	34	43	43	-	30.30	0.35
Sundays	63	60	61	65	-	3.17	6.56
Total annual sales (millions of copies)							
Dailies	15.8	15.9	14.0	14.3	-	-9.75	1.57
Non-dailies	2.0	1.7	2.3	2.6	-	30.00	13.04
Sundays	3.3	3.1	3.2	3.3	-	-1.52	2.52



MORE FACTS

	1997	1998	1999	2000	2001	Change (%)	
						97/2000	99/2000
Sales revenues (C£ 000)							
Dailies	6,320	6,140	5,616	5,700	-	-9.81	1.50
Non-dailies	1,051	934	1,035	1,040	-	-1.05	0.48
Sundays	1,310	1,232	1,268	1,300	-	-0.76	2.52



Distribution costs

	1998	1999	2000
Average distribution cost per copy			
Single copy C£	0.09	0.09	0.09

Top titles (2000)

Title	Publisher	Circulation (000)	Cover Price		Format
			C£	US\$	
Phileleftheros	Phileleftheros Ltd	25.0	0.40	0.66	Broadsheet
Simerini	Dias Publishing House Ltd	6.5	0.40	0.66	Broadsheet
Alithia	Alithia Ltd	5.0	0.40	0.66	Broadsheet
Charavgi	Telegraphos Ltd	4.5	0.40	0.66	Broadsheet
Politis	Arktinos Ltd	4.5	0.40	0.66	Broadsheet
Apogeymatini	Evga Ltd	4.0	0.40	0.66	Tabloid
Cyprus Mail	Cyprus Mail Ltd	3.6	0.40	0.66	Broadsheet
Machi	Atrotos Ltd	1.2	0.40	0.66	Broadsheet

Cover prices (2000)

	C£
Single copy	0.40

Internet publishing (2000)

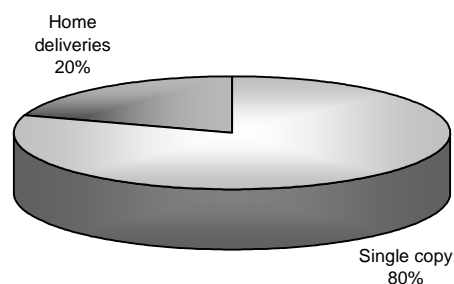
Newspapers with online editions
Phileleftheros
Simerani



Type of newspaper sales (%)

	Single copy	Home deliveries
1996	80	20
1997	80	20
1998	80	20
1999	80	20
2000	80	20

Type of newspaper sales in 2000 (%)



Newspaper formats (2000)

Number of:	1999	2000
Broadsheets	7	6
Tabloids	1	2

CROSS MEDIA OWNERSHIP

Owners	Regional TV	National TV	Regional Newspapers	National Newspapers	Radio
Regional Television Licensees	Maximum of one	Maximum of one	No limit	No limit	Max. one. Barred if they own more than 20% of the share capital in a TV station.
National Television Licensees	Maximum of one	Maximum of one	No limit	No limit	Max. one. Barred if they own more than 20% of the share capital in a TV station.
Regional Newspaper Owners	Max. one. Barred if they own more than 20% of the share capital in a newspaper.	Max. one. Barred if they own more than 20% of the share capital in a newspaper.	No limit	No limit	Max. one. Barred if they own more than 20% of the share capital in a newspaper.
National Newspaper Owners	Max. one. Barred if they own more than 20% of the share capital in a newspaper.	Max. one. Barred if they own more than 20% of the share capital in a newspaper.	No limit	No limit	Max. one. Barred if they own more than 20% of the share capital in a newspaper.
Local radio Licensees	Max. one. Barred if they own more than 20% of the share capital in a radio station.	Max. one. Barred if they own more than 20% of the share capital in a radio station.	No limit	No limit	
National radio Licensees	Max. one. Barred if they own more than 20% of the share capital in a radio station.	Max. one. Barred if they own more than 20% of the share capital in a radio station.	No limit	No limit	
Foreign Investors	Up to 2.5% per investor. All foreign investors cannot own more than 10% of total share capital.	Up to 2.5% per investor. All foreign investors cannot own more than 10% of total share capital.	No limit	No limit	Up to 2.5% per investor. Foreign investors cannot own more than 10% of total share capital.

ADVERTISING EXPENDITURE & ECONOMIC DATA

Main economic indicators 1996-2002

	1996	1997	1998	1999	2000	2001	2002
1 US\$=	0.61						
	C£ at 2002 rate						
Gross Domestic Product (C£ million)							
at current prices	4,161	4,371	4,695	5,009	5,458	-	-
% change	4.3	5.0	7.4	6.7	9.0	-	-
at 2002 prices	4,888	4,957	5,207	5,470	5,723	-	-
% change	1.2	1.4	5.0	5.1	4.6	-	-
Gross Domestic Product per capita (C£)							
at current prices	5,623	5,907	6,260	6,679	7,182	-	-
at 2002 prices	6,606	6,698	6,943	7,293	7,530	-	-
Population							
Millions	0.7	0.7	0.8	0.8	0.8	0.8	0.8
Consumer Price Index							
2002=100	85.1	88.2	90.2	91.6	95.4	97.3	100.0
% change	3.0	3.6	2.2	1.6	4.2	2.0	2.8
Ad.spend as a % of GDP							
	1.01	1.19	1.17	1.61	-	-	-
Advertising Expenditure Growth (%)							
at current prices	5.0	24.0	5.2	47.4	-	-	-
at 2002 prices	1.9	19.7	2.9	45.2	-	-	-

Source: IFS, ZenithOptimedia

**Advertising expenditure***(C£ millions, in current prices)*

	1993	1994	1995	1996	1997	1998	1999
Newspapers	6.6	5.3	6.1	6.4	7.9	6.1	7.6
Magazines	3.0	3.2	3.6	3.8	4.4	5.7	6.7
Television	15.2	20.5	26.5	28.0	35.2	43.0	66.5
Radio	3.4	3.2	3.8	3.8	4.6	4.6	4.6
Total	28.2	32.2	40.0	42.0	52.1	54.8	54.8

Source: MEMRB/AMER Research/Megasoft/ZenithOptimedia

Notes: Includes agency commission, production costs and classified advertising

Research

Circulation is audited by: 'Papyrus' General Distribution Press Agency Ltd, and other distributors.

Corporation tax is 20% on the first C£100,000 of profits and 25% after this.

Taxes

VAT on: sales 0% advertising 10%
 newsprint 10% plant 10%
 (standard VAT rate 10%)

Discounts

on: post 50% rail 0
 telephone 50% telegraph 50%
 telex 50%

CZECH REPUBLIC

POPULATION

Population by age and sex

	All individuals		Male		Female		Households 000
	000	%	000	%	000	%	
Children	1,590	16	816	16	774	15	4,271
16-24	1,439	14	736	15	703	13	
25-34	1,630	16	830	17	800	15	
35-44	1,334	13	677	14	657	13	
45-54	1,554	15	771	16	783	15	
55-64	1,237	12	588	12	649	12	
65+	1,418	14	548	11	870	17	
Total	10,202	100	4,966	100	5,236	100	

Source: Czech Statistical Office 31/12/2002

Housewives (co-habiting persons)

	Housewives	
	000	%
under 25	225	5
25-34	827	20
35-44	772	18
45-54	862	21
55-64	714	17
over 65	795	19
Total	4,194	100

Source: Media Projekt 2003

Population by social class

	All adults		Male		Female	
	000	%	000	%	000	%
A	790	9	440	10	350	8
B	787	9	412.9	10	374	8
C	2,425	28	1,071	25	1,354	30
D	1,865	21	962	23	903	20
E	2,850	33	1,373	32	1,477	33
Total	8,717	100	4,258	100	4,459	100

Source: Media Projekt 2003, population aged 12-79

A= Upper middle class - higher managerial, administrative or professional

B= Middle class - intermediate managerial, administrative or professional

C= Lower middle class & skilled working class - supervisory or clerical, and junior managerial, administrative or professional, and skilled manual workers

D= Working class - semi and unskilled manual workers

E= Those at lowest level of subsistence - state pensioners or widows (no other earners)

Households

Occupancy	Households	
	000	%
1 person	1,276	30
2 people	1,251	29
3 people	824	19
4 people	733	17
5 or more people	186	4

Families

without children	1,476	51
with children	1,434	49
Total	2,910	100

Source: Czech Statistical Office 31/12/2002

Age structure of readership

Age	% of readership	% daily reach within age group
12-19	8.0	30.6
20-29	19.1	45.8
30-39	16.7	49.6
40-49	19.1	53.4
50-59	19.1	53.8
60-69	10.5	47.2
70-79	7.5	42.2

Source: Media Projekt 2003

Newspaper reach

	Daily	Bi-weekly
All adults *	4243	7061
Men	2250	3555
Women	1993	3506
MHS **	2430	3804

Data recorded between 01/07/02 -17/12/02

* Reading population of 12-79 years, a sample of 8,565,000

** Main Household Shopper, a sample of 4,447,000

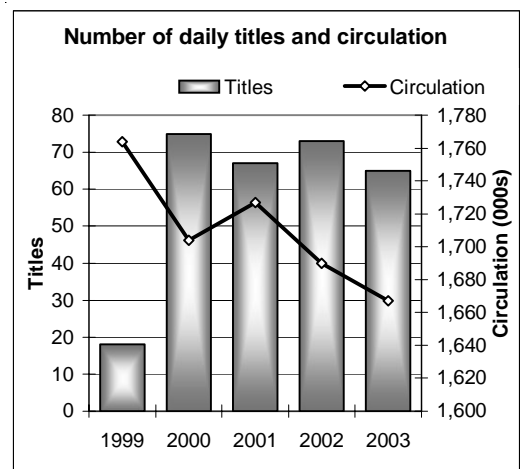
NUMBER OF TITLES AND CIRCULATION

	1999	2000	2001	2002	2003	Change (%)	
						99/2003	2002/03
Number of titles							
Total dailies †	18	75	67	73	65	-	-10.96
National dailies	10	10	8	7	7	-30.00	0.00
Local & regional dailies †	8	65	59	66	58	-	-12.12
Non-dailies	71	62	86	83	81	14.08	-2.41
National non-dailies	10	11	11	11	11	10.00	0.00
Local & regional non-dailies	61	51	75	72	70	14.75	-2.78
Sundays	2	1	2	1	1	-50.00	0.00
Free papers*	125	103	100	75	100	-20.00	33.33
Circulation (000)							
Total dailies	1,764	1,704	1,727	1,690	1,667	-5.50	-1.36
National dailies	1,351	1,326	1,345	1,238	1,204	-10.88	-2.75
Local & regional dailies	413	378	382	452	463	12.11	2.43
Non-dailies	801	765	775	739	750	-6.37	1.49
National non-dailies	215	200	205	199	200	-6.98	0.50
Local & regional non-dailies	586	565	570	540	550	-6.14	1.85
Sundays	251	229	351	308	318	26.69	3.25
Free papers*	4,700	4,100	4,000	3,600	-	-	-
Total annual sales (millions of copies)							
Dailies	520	509	514	494	544	4.62	10.12
Non-dailies	36	40	41	37	42	16.67	13.82
Sundays	11	13	17	15	17	54.55	15.65
Free papers	330	330	322	-	-	-	-

Source: Czech Publishers Association Yearbook 2004, National Bibliotheque Czech Republic, OMD Czech, ABC CR

† 57 local papers were included for the first time in 2000, making these figures incompatible with previous years

* estimated





MORE FACTS

	1999	2000	2001	2002	2003	Change (%)	
						99/2003	2002/03
Advertising revenues* (Koruna million)							
Dailies	4,207	4,900	5,228	6,021	6,389	51.87	6.11
Dailies §	4,658	5,221	5,322	6,021	6,258	34.35	3.93
Non-dailies~	250	287	840	400	183	-26.80	-54.25
Sundays	27	48	55	73	69	160.38	-5.48
Free papers	1,250	1,350	1,400	227	232	-81.44	2.20
Online	-	-	30-40	100	-	-	-
Sales revenues (Koruna million) **							
Dailies	3,850	3,820	3,900	3,797	3,797	-1.38	0.00
Dailies §	4,262	4,071	3,970	3,797	3,719	-12.75	-2.06
Non-dailies	265	300	310	279	279	5.28	0.00
Sundays	115	146	200	174	174	51.30	0.00
Volume of advertising sold (pages & page equivalents)							
Total	60,180	63,467	61,061	61,500	65,000	8.01	5.69
In colour ***	11,347	18,575	25,072	22,000	25,000	120.32	13.64

Source: 1999-2001 AC Nielsen, 2002-2003 TNS A-Connect, Czech Publishers Association Yearbook 2004

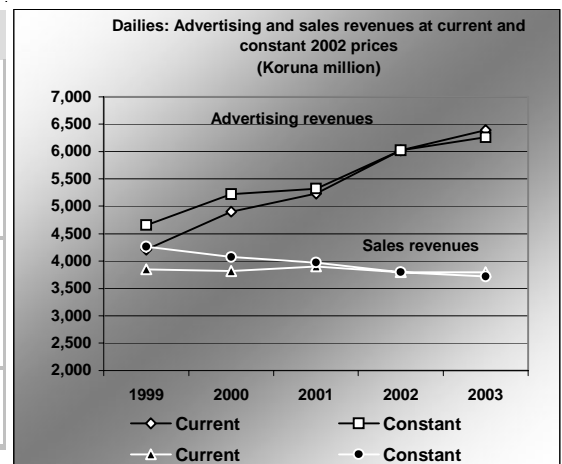
* includes classified, inserts, agency commission; excludes production costs; before discounts. Typical discounts 5-25%

** figures include VAT

*** additional colour and full colour

§ at constant 2002 prices

~ 2001 data for non-dailies is based on improved statistics on previous years, and so not directly comparable; 2003 data excludes national non-dailies



Contribution of classified, display and insert advertising to total advertising income (%)

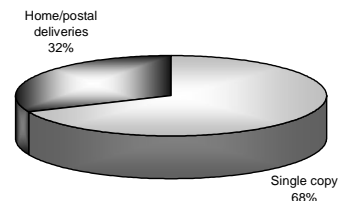
	1999	2000	2001	2002	2003
Display	88.9	85.1	86.1	93.2	92.8
Classified	4.5	4.9	4.3	3.2	3.1
Inserts	6.6	10.0	9.6	3.6	4.1

Source: 1999-2001 AC Nielsen, 2002-2003 TNS A-Connect

Type of newspaper sales (%)

	Single copy	Home/postal deliveries
1999	68.0	32.0
2000	69.0	31.0
2001	66.5	33.5
2002	68.2	31.8
2003	68.2	31.8

Type of newspaper sales in 2003 (%)



Distribution costs

	1999	2000	2001	2002	2003
As % of average cover price *					
Single copy sales	33	33	33	35	35
Home/postal deliveries	40	40	40	40	40
Average distribution cost per copy					
Subscription Koruna	2.80	3.00	3.20	3.40	3.50
Single copy Koruna	2.30	2.60	2.90	3.10	3.10

Source: Czech Publishers Association, ABC CR

* Average figures. The percentage has relation to the amount of distributed copies and range of distributional services

Media consumption (minutes per day)

	1999	2000	2001	2002	2003
Radio	200	178	174	167*	172*
Television	208	194	193	224 **	210 **
Internet	35	40	142	171 ***	172 ***

Source: Media Projekt, TV Projekt, iAudit

* Population aged 12-79

** Population aged 15-79

*** Internet users only

Top ten dailies (2003)

Title	Publisher	Circulation (000)	Readership (000)	Cover Price		Format (mm)	Full page rate (K)	
				K	US\$		Mono	Colour
Blesk	Ringier CR	458	1,371	6.00-10.00	0.22-0.37	Berliner	332,500	432,250
MF DNES	MAFRA	310	1,150	9.00-13.00	0.33-0.48	Berliner	352,350	493,290
Pravo	Borgis	195	612	9.00-13.00	0.33-0.48	Berliner	219,000	284,000
Deniky Moravia Total	Vltava Labe Press	170	-	8.50-11.00	0.31-0.41	Berliner	151,000	203,850
Lidove noviny	Lidove Noviny	79	314	9.50-14.50	0.35-0.54	Berliner	174,870	244,818
Hospodarske Noviny	Economia	74	228	10.00-14.00	0.37-0.52	Berliner	243,000	304,000
Stredoceske Deniky Bohemia + Vecernik Praha	Vltava Labe Press	72	143	8.50-11.00	0.31-0.41	Berliner	78,300	105,705
Sport	Ceskoslovensk y Sport	63	282	9.00-13.00	0.33-0.48	Berliner	100,560	140,784
Zapadoceske Deniky Bohemia	Vltava Labe Press	62	186	8.50-11.00	0.31-0.41	Berliner	86,130	116,276
Vychodoceske Deniky Bohemia	Vltava Labe Press	59	228	8.50-11.00	0.31-0.41	Berliner	62,640	63,266

Newspaper colour capability & formats

	1999	2000	2001	2002	2003
4- colour newspapers	10	14	17	17	67
Broadsheets	16	16	15	15	0
Other (Berliner etc)	2	2	3	2	67

Cover prices

	Koruna
Single copy	6.00-14.50
Subscription	5.50-14.00



Top ten advertising categories* (2003)

Advertising sector	% of display ad revenue
Motoring	17.1
Finance	14.4
Telecommunications	10.5
Personal advertising	7.3
Wholesale, COD	6.8
Entertainment & education	4.2
Housing, gardening & hobbies	3.8
Industrial production	3.6
Household equipment (electronic & electric)	3.5
Drugs & vitamins	2.1

Source: TNS A-Connect, Czech Publishers Association Yearbook 2004

* national and regional dailies

Top ten advertisers* (2003)

Advertiser	Newspaper expenditure (000s)
Skoda Volkswagen Group	775,425
Lidl	218,279
T-Mobile	181,240
Eurotel	171,529
Cesky Mobil	123,302
Agentura ATS	111,891
Sazka	110,404
PSA	100,440
Datart	94,366
Renault	94,047

Source: TNS A-Connect, Czech Publishers Association Yearbook 2004

* national and regional dailies

Top publishing companies* (2003)

	Total circulation
Vltava Labe Press	451,717
Ringier CR	378,477
MAFRA	312,077
Borgis	205,096
Lidove Noviny	91,031
Economia	74,534
Ceskoslovensky Sport	58,588
Futura	25,000**

Source: ABC CR

* national and regional dailies

** approximately

Employment

	1999	2000	2001	2002	2003	
Total no. of Journalists	2,000	2,000	2,000	2,100	~2,000	
Total salary costs*						
	Koruna	20,000	21,000	22,200	24,000 †	25,700 †
	Euro	554	608	702	1,000	1,073

* Average salary in publishing industry

† plus Koruna 8,500 employer contributions

Online readership (page impressions per month)

Newspaper	1999	2000	2001	2002	2003**
iDNES	3,243,316	5,104,344	3,057,000	28,166,000	927,578
Blesk	-	-	5,700,000	4,226,000	237,818
Pravo	-	-	-	-	893,843
Neris	-	-	-	-	58,316
Ceske, Financni, Sportovni Nov.	-	-	3,424,000	2,084,000	-
iHNed	431,229	831,707	1,916,000	1,010,000	122,594
Lidove Noviny	-	529,701	1,738,000	*	-

Source: iAudit, Czech Publishers Association Yearbook 2004

The figures above are independently audited

* included in iDNES

** number of unique visitors per month (average July-December 2003)

Internet publishing (No. of online editions)

	1999	2000	2001	2002	2003
Dailies	9	10	9	8*	8*
Non-dailies	12	13	14	14	14
Sundays	-	-	-	-	1

* Regional dailies Deniky Bohemia and Deniky Moravia have one common webserver including access to all regional and local news.

CROSS MEDIA OWNERSHIP

Owners	Regional TV	National TV	Regional Newspapers	National Newspapers	Radio
Regional TV Licensees	*	*	*	*	*
National TV Licensees	*	*	*	*	*
Regional Newspaper Owners	*	*	No limit	No limit	*
National Newspaper Owners	*	*	No limit	No limit	*
Satellite TV Broadcasters	*	*	*	*	*
Local radio Licensees	*	*	*	*	*
National radio Licensees	*	*	*	*	*
Foreign Investors	*	*	No limit	No limit	*

* Subject to the approval of the licensing authority.



ADVERTISING EXPENDITURE & ECONOMIC DATA

Advertising expenditure	(Koruna millions, in current prices)										
	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
Newspapers	1,843	3,035	4,390	4,896	5,526	5,461	6,490	6,709	6,844	6,980	7,120
Magazines	2,287	3,771	4,199	5,111	5,783	6,209	6,472	6,867	7,141	7,427	7,724
Television	5,378	7,215	9,194	12,006	14,516	17,970	15,529				
Radio	807	661	857	1,144	1,050	1,040	1,693				
Cinema	-	-	-	-	-	76	63				
Outdoor	-	-	1,030	976	1,190	1,859	1,934				
Internet	-	-	-	55	100	200	240				
Total	10,315	14,681	19,670	24,189	28,165	32,815	32,421	34,466	35,681	36,970	38,294

Source: 1996-2002 Amer Nielsen, TNS A-Connect, 2003-2006 ZenithOptimedia

Notes: Excludes agency commission and production costs, before discounts

Main economic indicators 1996-2002

	1996	1997	1998	1999	2000	2001	2002
1 US\$=	32.74						
	Koruna at 2002 rate						
Gross Domestic Product (K billion)							
at current prices	1,567	1,680	1,839	1,902	1,985	2,175	2,276
% change	13.5	7.2	9.5	3.4	4.3	9.6	4.6
at 2002 prices	2,129	2,102	2,080	2,106	2,115	2,214	2,276
% change	11.1	-1.2	-1.1	1.3	0.4	4.7	2.8
Gross Domestic Product per capita (K 000)							
at current prices	151.8	163.1	178.7	185.0	193.3	211.4	223.0
at 2002 prices	206.3	204.1	202.1	204.9	205.9	215.2	223.0
Population							
Millions	10.3	10.3	10.3	10.3	10.3	10.3	10.2
Consumer Price Index							
2002=100	73.6	79.9	88.4	90.3	93.8	98.2	100.0
% change	8.8	8.5	10.7	2.1	3.9	4.7	1.8
Ad.spend as a % of GDP							
	0.66	0.87	1.07	1.27	1.42	1.51	1.42
Advertising Expenditure Growth (%)							
at current prices	27.3	42.3	34.0	23.0	16.4	16.5	-1.2
at 2002 prices	17.0	31.1	21.1	20.4	12.1	11.3	-2.9

Source: IFS, ZenithOptimedia

Research

Circulation is audited by: ABC CR (Audit Bureau of Circulation, Czech Republic).

Readership is measured by: Media Projekt 2003, realised by GfK Praha and Median.

Methodology: Each year 30,000 face-to-face questionnaires are conducted on 8,718 respondents, 12-79 years of age, randomly selected from a database of all households. The questionnaire includes 70 regional and local dailies, and approximately 300 countrywide magazines. Since 2003 sampling has been done four times a year.

Taxes

VAT on: sales 5% advertising 22%
 newsprint 22% plant 22%
 composition 22% (standard VAT rate 22%)

The tax rate on profits for newspapers is 29%, which is the same as for all private companies.

Discounts

on: post 20-30% rail 0 telephone 0 telegraph 0 telex 0

Ownership

Does any law exist governing publishing-house ownership, or the registration of shares in newspaper-publishing companies? Generally under the Competition Law.

Is there any law prohibiting or restricting foreign companies or individuals from owning shares, and in particular, the majority of shares, of domestic daily newspapers? No

Is there any law prohibiting daily newspaper or periodical publishers from operating radio or television stations in the same locality? No

So as to guarantee disclosure and transparency in the capital structure and to avert silent partnerships, is there a law or rule making it possible to determine who actually owns a publishing company? No

Is there an antitrust law limiting concentration in the daily press? Generally under the Competition Law. The Office for the Protection of Competition decides about every merger and market share over 40%.

Is further regulation of media concentration expected? No

Commentary – Danish Newspaper Publishers Association

Danish GDP is expected to grow by only 0.75% in 2004; private investment has fallen sharply and private consumption is sluggish, so domestic demand is weak. The slowdown has led to a large increase in unemployment. However, it is expected that the rate of growth will accelerate to 2.25% in 2005, as a result of the international recovery and a reduction in the level of Danish income tax. Unemployment should fall considerably in the course of 2004. In 2005 and 2006 the Danish economy is expected to grow by around 2% each year, and unemployment should fall further.

As the Danish Economic council argues, uncertainty in the global economy, linked among other things to the war in Iraq, has abated to a large extent, but growth in European economies has been disappointing. This weak growth has led to increasing public deficits in most European economies. In the United States, the pick-up in growth is supported by expansionary fiscal and monetary policies. Even though the US economy is faced with several imbalances, the outlook for

it seems promising in the short run. High rates of growth are therefore expected in the United States in the next few years. Better global prospects will help to bring about a somewhat belated recovery in Europe.

The circulation of paid newspapers continued to decline in 2003, but the overall circulation of dailies increased by 23% thanks to the presence of the free dailies. These free commuter papers have encouraged more people to read newspapers regularly: the daily reach of newspapers increased from under 75% in 2002 to nearly 80% in 2003.

Two large newspaper publishers merged at the beginning of 2003: Morgenavisen Jyllandsposten (which published *Jyllands-Posten*, Denmark's biggest daily newspaper) and A/S Dagbladet Politiken (which published *Politiken* and *Ekstra-Bladet*, respectively the third and fourth largest dailies). The merged publishing group is called JP/Politikens Hus Ltd and is by far the largest newspaper publisher in Denmark.

POPULATION

Population by age and sex

	All individuals 12+		Male		Female		Households 000
	000	%	000	%	000	%	
12-15	268	6	141	6	127	5	2,446
16-24	520	11	254	11	266	11	
25-34	752	16	376	17	376	16	
35-44	813	18	424	19	389	17	
45-54	735	16	371	17	364	16	
55-64	677	15	337	15	340	15	
65+	798	17	338	15	460	20	
Total	4,563	100	2,241	100	2,322	100	

Source: TNS Gallup 1H 2003

Housewives (co-habiting persons)

	Housewives	
	000	%
under 25	118	6
25-34	369	18
35-44	387	19
45-54	364	18
55-64	339	17
over 65	459	23
Total	2,036	100

Source: TNS Gallup 1H 2003

Population by social class and sex

	All individuals 12+		Male		Female	
	000	%	000	%	000	%
Upper	787	17	530	24	257	11
Middle	1,921	42	925	41	996	43
Working	1,659	36	716	32	943	41
No response	197	4	71	3	126	5
Total	4,564	100	2,242	100	2,322	100

Source: TNS Gallup 1H 2003

Newspaper reach (%)

	Daily
All adults	79.7
Men	82.8
Women	76.8
MHS	79.5

Source: TNS Gallup H1 2003

MHS: Main Household Shopper

Households

Occupancy	Households	
	000	%
1 person	921	38
2 people	786	32
3 people	306	13
4 people	323	13
5 or more people	109	4
without children	1,877	77
with children	569	23
with children aged 0-3	239	10
with children aged 4-9	359	15
with children aged 10-15	313	13
Total	2,446	100

Source: TNS Gallup 1H 2003

Age structure of readership

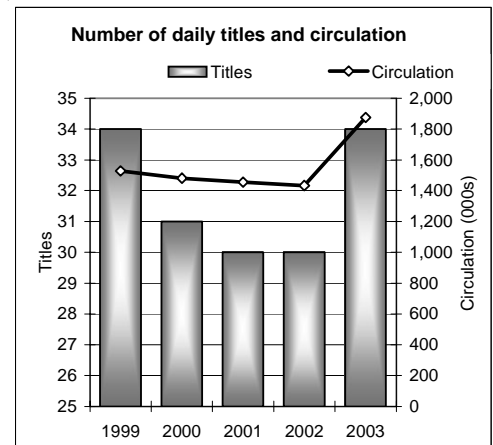
Age	% of readership	% reach within age group
Less than 16	4.2	57.2
16-24	11.0	76.6
25-34	15.6	75.7
35-44	17.5	78.2
45-54	17.1	84.7
55-64	16.0	86.0
65+	18.6	84.7

Source: TNS Gallup 1H 2003



NUMBER OF TITLES AND CIRCULATION

	1999	2000	2001	2002	2003	Change (%)	
						99/2003	2002/03
Number of titles							
Total dailies	34	31	30	30	34	0.00	13.33
National dailies	10	10	9	9	9	-10.00	0.00
Regional & local dailies	24	21	21	21	21	-12.50	0.00
Free dailies	-	-	-	-	4	-	-
Non-dailies	281	282	279	279	301	7.12	7.89
National non-dailies	1	1	1	1	1	0.00	0.00
Free non-dailies	280	281	278	278	300	7.14	7.91
Circulation (000)							
Total dailies	1,528	1,481	1,456	1,433	1,875	22.71	30.84
National dailies	871	854	827	818	783	-10.10	-4.28
Regional & local dailies	657	627	629	615	598	-8.98	-2.76
Free dailies	-	-	-	-	494	-	-
Non-dailies	8,205	8,208	8,326	7,442	7,563	-7.82	1.63
National non-dailies	63	66	66	64	63	0.00	-1.56
Free non-dailies	8,142	8,142	8,260	7,378	7,500	-7.89	1.65
Total annual sales (millions of copies)							
Dailies	549	530	519	510	619	12.75	21.37
National dailies	-	-	-	-	241	-	-
Regional & local dailies	-	-	-	-	249	-	-
Free dailies	-	-	-	-	129	-	-
Non-dailies	426	426	432	386	396	-7.04	2.59
National non-dailies	3	3	3	3	3	0.00	0.00
Free non-dailies	423	423	429	383	393	-7.09	2.61

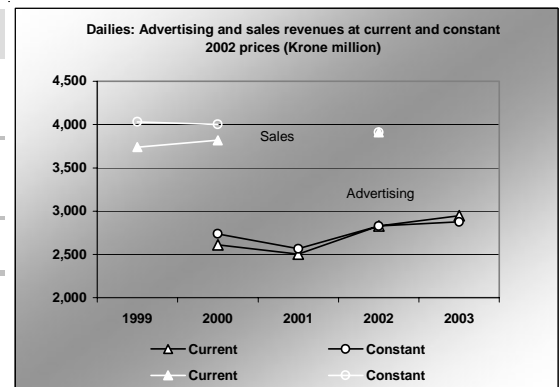


Source: Danish Audit Bureau of Circulation

MORE FACTS

	1999	2000	2001	2002	2003	Change (%)	
						2000/03	2002/03
Advertising revenues (Krone million)							
Dailies	-	2,611	2,503	2,827	2,945	12.79	4.17
Dailies §	-	2,737	2,564	2,827	2,876	5.09	1.73
Sales revenues (Krone million)							
Dailies	3,738	3,818	-	3,910	-	-	-
Dailies §	4,033	4,002	-	3,910	-	-	-
Volume of advertising sold (pages & page equivalents)							
Total	94,447	90,000	81,759	77,750	-	-	-

§ at constant 2002 prices

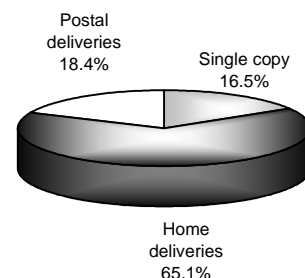


Type of newspaper sales (%)

	Single copy	Home deliveries	Postal deliveries
1999	21	60	19
2000	20	61	19
2001	20	61	19
2002	21	61	18
2003	16.5	65.1	18.4

Source: Danish Newspaper Association H1 2003

Type of newspaper sales in H1 2003 (%)



Contribution of classified, display and insert advertising to total advertising income (%)

	1999	2000	2001	2002	2003
Display	46.6	49.4	-	50	52
Classified	52.1	49.0	-	48	45
Inserts	1.3	1.6	-	2	3



Top ten dailies (2003)

Title	Publisher	Circulation (000)	Readership (000)	Cover Price		Format	Full page rate (DKr)	
				DKr	US\$		Mono	Colour
Jyllands-posten	JP/Politikens Hus A/S	172	725	13.50	1.71	Broadsheet	115,024	151,024
Berlingske Tidende	Det Berlingske Officin A/S	142	468	12.00	1.52	Broadsheet	84,240	110,240
Politiken	JP/Politikens Hus A/S	137	539	12.00	1.52	Broadsheet	84,032	109,032
Ekstra-Bladet	JP/Politikens Hus A/S	110	494	10.50	1.33	Tabloid	41,800	64,800
B.T	Det Berlingske Officin A/S	110	532	10.50	1.33	Tabloid	42,486	65,486
Nordjyske Stiftstidende	Nordjyllands Aktieselskab	82	214	13.00	1.65	Broadsheet	57,824	69,824
Jydske Vestkysten	A/S Jydske Vestkysten	82	261	13.00	1.65	Broadsheet	60,944	71,144
Fyens Stiftstidende	Fyens Stiftstidende A/S	62	174	13.00	1.65	Broadsheet	39,104	47,904
Børsen	Dagbladet Børsen A/S	62	235	15.00	1.90	Tabloid	56,612	69,612
Århus Stiftstidende	Det Berlingske Officin A/S	55	175	12.00	1.52	Broadsheet	54,080	64,080

Top ten advertising categories (2003)

Advertising sector	% of display ad revenue
Miscellaneous advertising	26.5
Electronics & telecommunications	17.2
Vehicles	13.3
Travel & transport	8.9
Furniture and fittings	7.8
Retailing	7.7
Clothes/clothing industry	7.2
Finance, capital & insurance	5.6
Drinks	3.6
Builders supplies, building articles	2.2

Source: Gallup Adfacts

Top ten publishing companies (2003)

	Total circulation (000)
JP/Politikens Hus	420,347
Det Berlingske Officin A/S	252,631
Nordjyske Stiftstidende	81,897
A/S Jydske Vestkysten	81,795
Fyens Stiftstidende	62,240
Århus Stiftstidende A/S	54,752
A/S Børsen	61,643
Dagbladet A/S	54,394
De Bergske Blade	46,800
Sjællandske Tidende	29,708

Source: Danish Newspaper Association.
Danish Audit Bureau of Circulation 1H 2003

Top ten advertisers (2003)

Advertiser	Newspaper expenditure DKr (000)
Hewlett-Packard	52,593
SAS	39,761
Bilka	38,633
Philipson Wine	36,874
Magasin	34,815
Klasselotteriet	32,961
DSB	30,462
TDC	30,290
Salling	28,137
TDC Butik	27,526

Source: Gallup Adfact

Internet publishing (No. of online editions)

	1999	2000	2001	2002	2003
Dailies	26	34	29	29	32
Non-dailies	-	-	1	1	1

Online readership (unique visitors per week)

Newspaper	2003
Ekstra-Bladet	www.eb.dk 1,597,247
B.T	www.bt.dk 964,737
Jyllands-Posten	www.jp.dk 687,030
Politiken	www.politiken.dk 489,939
Berlingske Tidende	www.berlingske.dk 440,116

Source: FDIM.dk – Week 49/2003

Cover prices

	DKr
Single copy	8.75-13.50
Subscription	6.50-11.00

Source: Danish Newspaper Association

Employment & salary

	1999	2000	2001	2002
Total no. of journalists	3,140	3,120	2,879	2,873
Total no. of employees	11,213	10,750	10,664	9,968

Media consumption (minutes per day)

	2000	2001	2002	2003
Newspapers	27.9	-	-	-
Magazines	7.1	-	-	-
Radio	-	195	187	188
Television	-	152	169	158
Internet	-	6.5	-	-

Source: TNS Gallup 1H 2003

Newspaper colour capability & formats

Number of:	1999	2000	2001	2002	2003
4-colour newspapers	33	30	29	29	35
Broadsheets	28	25	25	25	23
Tabloids	5	5	5	5	12
Other	1	1	-	-	-

ADVERTISING EXPENDITURE & ECONOMIC DATA

Advertising expenditure

(Krone millions, in current prices)

	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
Newspapers	5,224	5,560	5,805	5,471	5,580	5,238	4,794	4,650	4,700	4,700	4,750
Magazines	356	363	379	410	385	364	333	350	360	370	380
Television	1,710	1,867	2,010	1,801	1,823	1,747	1,675				
Radio	169	174	181	188	213	234	222				
Cinema	63	66	63	48	46	50	70				
Outdoor	187	267	273	271	338	343	336				
Internet	0	0	0	0	0	310	418				
Other	2,081	2,338	2,478	2,350	2,655	2,757	2,875				
Total	9,790	10,635	11,189	10,539	11,040	11,043	10,723	11,100	11,410	11,645	11,985

Source: 1996-2002 Dansk Oplagskontrol, 2003-2006 ZenithOptimedia

Notes: Includes agency commission only until 1998, excludes production costs and classifieds, magazines are consumer only, before discounts
Other includes free magazines, trade press, annuals, directories and outdoor.

NB: Agency commission was removed from the monitored figures in 1999, hence the drop in expenditure that year

**Main economic indicators 1996-2002**

	1996	1997	1998	1999	2000	2001	2002
1 US\$=	7.90	Krone at 2002 rate					
Gross Domestic Product (Krone billion)							
at current prices	1,061	1,116	1,155	1,208	1,281	1,325	1,358
% change	5.1	5.2	3.5	4.5	6.1	3.5	2.5
at 2002 prices	1,221	1,257	1,278	1,303	1,342	1,358	1,358
% change	2.9	2.9	1.6	2.0	3.0	1.1	0.0
Gross Domestic Product per capita (Krone 000)							
at current prices	201.7	211.4	218.0	226.6	239.9	248.6	254.8
at 2002 prices	232.1	238.1	241.1	244.4	251.4	254.7	254.8
Population							
Millions	5.3	5.3	5.3	5.3	5.3	5.3	5.3
Consumer Price Index							
2002=100	86.9	88.8	90.4	92.7	95.4	97.6	100.0
%change	2.1	2.2	1.8	2.5	2.9	2.3	2.4
Ad.spend as a % of GDP							
	0.92	0.95	0.97	0.87	0.86	0.83	0.79
Advertising Expenditure Growth (%)							
at current prices	4.6	8.6	5.2	-5.8	4.8	0.0	-2.9
at 2002 prices	2.4	6.3	3.3	-8.1	1.8	-2.2	-5.2

Source: IFS, ZenithOptimedia

Research

Circulation is audited by: Danish Audit Bureau of Circulations
Readership is measured by: TNS Gallup
Methodology: Computer-assisted telephone interviews (CATI) in combination with diaries.

Taxes

VAT on: sales 0 advertising 25%
 newsprint 25% plant 25%
 composition 25% (standard VAT rate 25%)
 The tax rate for all companies in Denmark is 32%

Subsidies

Newspapers received direct subsidies amounting to DKr 9 million in 2002 and DKr 14 million in 2003.

Discounts

on: post * rail 0 telephone 0 telegraph 0 telex 0
 * There is a reduction on postal rates but it is not possible to calculate this as a percentage.

Ownership

Does any law exist governing publishing-house ownership, or the registration of shares in newspaper-publishing companies? No

Is there any law prohibiting or restricting foreign companies or individuals from owning shares, and in particular, the majority of shares, of domestic daily newspapers? No

Is there any law prohibiting daily newspaper or periodical publishers from operating radio or television stations in the same locality? No

So as to guarantee disclosure and transparency in the capital structure and to avert silent partnerships, is there a law or rule making it possible to determine who actually owns a publishing company? No

Is there an antitrust law limiting concentration in the daily press? No

Is further regulation of media concentration expected? No

DJIBOUTI

General economic situation

GDP total US\$619 million; GDP per capita US\$1,354 (purchasing power parity; 2002). Consumer price index 102 (2002).

Performance of newspapers vs. other media

The state owns and closely controls all electronic media. In 2000, the British Broadcasting Corporation (BBC) began broadcasting its World Service in the country in conjunction with Radio-Television Djibouti (RTD), the official government station. Djibouti and the United States in 2002 agreed to set up radio relay stations in Djibouti to broadcast Arabic radio programs of the Voice of America. Radio France Internationale also broadcasts in the country.

Performance of different types of newspapers

The state owns and closely controls the country's principal newspaper, La Nation, published three times a week. There are several opposition-run weekly and monthly publications that are generally allowed to circulate freely.

Media/press laws

Slander is prohibited by constitution. The law prohibits the dissemination of 'false information' and regulates the publication of newspapers.

Source: CIA - The World Factbook 2003; US State Department; Freedom House

POPULATION

Population by age and sex

	All individuals		Male		Female	
	000	%	000	%	000	%
0-14	197	43	99	42	98	44
15-64	246	54	129	55	117	53
65+	14	3	7	3	7	3
Total	457	100	235	100	222	100

Source: CIA - The World Factbook 2003

DOMINICA

General economic situation

GDP total US\$380 million; GDP per capita US\$5,428 (purchasing power parity; 2002). Consumer price index 101 (2002).

Performance of newspapers vs. other media

The principal radio station is state-owned and has a government-appointed board. There is also an independent radio station owned by a private company. Citizens have access to cable TV and radio reception from neighbouring islands.

Performance of different types of newspapers

Dominica has no daily newspapers. There are three main privately owned weekly newspapers, the Chronicle, the Sun and Tropical Star.

Media/press laws

There are no laws that constrain press freedom.

Sources: CIA - The World Factbook 2003; Freedom House; Commonwealth Press Union; US State Department

POPULATION

Population by age and sex

	All individuals		Male		Female	
	000	%	000	%	000	%
0-14	20	29	10	29	10	29
15-64	45	64	23	66	22	63
65+	5	7	2	6	3	9
Total	70	100	35	100	35	100

Source: CIA - The World Factbook 2003

General economic situation

GDP total US\$53.78 billion; GDP per capita US\$6,170 (purchasing power parity; 2002). Consumer price index 105.3 (2002).

Performance of newspapers vs. other media

Ownership of TV channels, radio stations and newspapers is concentrated in a few economically and politically-powerful hands. There are several terrestrial TV channels and some 30 multichannel cable TV operators. More than 200 radio stations are on the air, most of them commercial. There are two government radio stations.

Performance of different types of newspapers

There are nine daily and seven weekly newspapers and three weekly magazines. The capital of Santo Domingo is home to three free newspapers, *El Diario Libre*, *El Expreso* and *El Dia*.

Newspaper launches/closures

In 2003, El Caribe daily launched *Pandorra* magazine as part of the newspaper every 15 days to target its female audience. Fraud charges levelled against one of the country's main media magnates in 2003, and the collapse of banking group, led to the seizure by the authorities of many press and broadcast outlets. Two dailies subsequently ceased publication.

Advertising

State exerts economic pressure on the media through denial of advertising revenues.

Taxes

State exerts economic pressure on the media through imposition of taxes on imported newsprint.

Sources: CIA - *The World Factbook 2003*; *Freedom House*; *US State Department*; *BBC*; *Ideas Magazine*

POPULATION & MORE FACTS

Population by age and sex

	All individuals		Male		Female	
	000	%	000	%	000	%
0-14	2,929	34	1,498	34	1,431	33
15-64	5,334	61	2,720	61	2,614	61
65+	453	5	212	5	241	6
Total	8,716	100	4,430	100	4,286	100

Source: CIA - *The World Factbook 2003*

Top dailies (2003)

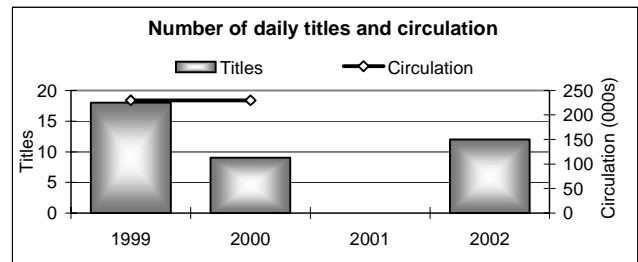
Title	Cover Price	
	DOP	US\$
Listin Diario	0.15	0.32
El Siglo	-	-
El Caribe	-	-
Hoy	-	-
Ultima Hora	-	-
El Nacional	0.15	0.32
El Nuevo Diario	-	-
El Sol	-	-
La Noticia	-	-

Source: WAN from public sources

NUMBER OF TITLES AND CIRCULATION

	1999	2000	2001	2002	Change (%)	
					1999/2002	2001/2002
Number of titles						
Total dailies	18	9	-	12	-33.33	-
<i>National dailies</i>	-	-	-	9	-	-
<i>Free dailies</i>	-	-	-	3	-	-
Non-dailies	8	8	-	7	-12.50	-
Circulation (000)						
Total dailies	230	230	-	-	-	-
Non-dailies	215	215	-	-	-	-

Source: UNESCO; WAN from public sources



Commentary – Internews

General situation

As East Timor enters its third year of independence and grapples with the challenges of building a nation, it has become evident that the media have a critical role to play in the development of this new democracy.

The institutions established under East Timor's constitution are taking their first steps at evaluating their effectiveness. Continued economic hardship is harming all government institutions and non-governmental organisations. While gas and oil are being mined off East Timor's shores, these natural resources are not expected to generate any revenues for at least ten years.

In this difficult political and economic environment, media organisations and journalists are being challenged to provide free and independent information to the public, to facilitate thoughtful and informed public debate, and to provide an opportunity for the public to give feedback to their government, community and business leaders.

The emergent political environment and economy are likely to remain unstable through this period of ongoing growth and transformation. Key challenges for the media in East Timor include:

1. achieving economic viability in a very difficult economy;
2. exercising rights established in the constitution and law;
3. developing journalism skills and accessing information to enable informed reporting and analysis;
4. practicing accurate and balanced analytical reporting on political events and processes, including reporting on government accountability and the work of the parliament;
5. ensuring that national news reaches the districts and regional news with national import makes its way back to the capital;
6. overcoming the continued gap in technical expertise, know-how and equipment maintenance skills.

Performance of newspapers vs. other media

A number of newspapers were established after 1999, but few have flourished owing to the cost of paper and printing, and low circulation in the districts, where literacy is low and distribution difficult.

Five strong publications have emerged to serve the needs of the local community: two daily papers and three weekly current affairs publications. The two dailies – *Suara Timor Lorosa'e* (which publishes in Bahasa Indonesian, Tetum and has small sections in Portuguese and English) and the *Timor Post* (Bahasa Indonesian, Tetum and small sections in Portuguese and English), have proven themselves to be sustainable and publish every day. The weeklies are *Talitakum* (Bahasa Indonesian and Tetum), *Vox Populi* (Bahasa Indonesian) and *Seminario* (a new Portuguese weekly). These weekly papers service the news and information needs of Dili, the capital, and provide the most dependable in-country news source to radio stations in the districts, which have no access to internet, telephone or television. The weekly *Talitakum* provides a platform for intellectual debate in the country, and is strong on more in-depth features and investigative journalism.

There is also a weekly sport tabloid *A BOLA*, a commercial newspaper published by a sport journalists group.

Newspaper cover prices, while extremely low by international standards, are the equivalent of the average daily income per capita for over a third of East Timor's citizens.

Radio is an extremely important medium in East Timor. It reaches across the boundaries of literacy and resonates with the traditional oral history culture of communities in all districts. It often provides the only form of entertainment in some districts and always delivers information cheaply and in local dialects. Research completed by the International Republican Institute (IRI) found that the vast majority of people in East Timor (63%) get their political information from the radio. The 2002 survey by The Asia Foundation (TAF) found that 67% of the population get their political information from radio. More than 60% of the population live in households with radios. This has led to rapid growth of small community stations in tandem with the development of the public broadcaster.

The National Public Broadcaster, RTL, is the only media outlet to receive government funding, though it receives only a fraction of what it received under the governance of UNTAET (the United Nations transition administration). The community radio stations are in an even more precarious situation; most of their workers are unpaid volunteers. Radio Timor Kmanek (RTK) is the most financially viable of all the stations and was operating prior to 1999. RTK receives funding from a Catholic NGO called Caritas, and secures the remaining 25% of its income through on-air advertising. Opportunities for advertising are limited in Dili and are non-existent in the districts. These stations depend on forming partnerships with NGOs and international organisations, securing agreements on civic education programmes, and in-kind donor assistance.

Television has a lower reach than radio because of the cost of purchasing and running a television set, and also because no signals are transmitted in the districts. Around 12% of Timor's population use television as their main source of political information. This figure drops to 2%-5% in the districts, and rises to 47% in Dili (IRI survey 2003). The TAF survey found that 17% of the total population get their political information from TV.

The television channel TVTL produces a small amount of local programming daily (1.5 hours per day) and retransmits and rebroadcasts programming provided primarily by Portugal, Australia, and the UK.

Satellite television can be received across all of East Timor by the few households or businesses with television sets. Households with a set and a satellite dish can receive a vast array of programming in a range of languages, predominately Indonesian, Korean, Japanese, Malaysian, Chinese and English.

Most Timorese families cannot afford a pay-TV service such as Indovision, however some businesses and wealthier families can access full services of the BBC, CNN, HBO or ABC through subscription-based satellite platforms.

Performance of different types of newspapers

All of the newspapers are produced and printed in Dili, and are distributed to the districts by small buses, providing an ad hoc service to communities with limited income. Most households can not afford a 50 cent newspaper once a week



let alone once a day. These papers do provide a great information service to community radio in the districts; however, they often arrive one or two days late, or not at all.

Newspaper launches closures

Two new newspapers have opened this year – *Vox Populi* and *Seminario* – both of which provide deeper political analysis than the daily papers; however, the level of critical analysis on matters of public interest and governance is still low compared to the aspirations of the journalists and their understanding of international standards. *Talitakum* – the longest-standing social and political analysis weekly paper – has been out of print for a number of months due to grant acquittal issues and changes in management, but recent editions have been sent to print and it should have returned to the streets before the end of March 2004.

Advertising

As the international aid community has left the country so has a lot of purchasing power in Dili, and advertising revenue has gone with it. One of Timor's daily papers derives 80% of its income from advertising (the other 20% coming from copy sales); this yielded about US\$6,000 a month before East Timor became fully independent in May 2002, but only about US\$4,500 afterwards. Its ad revenues began to recover in 2003, however. It generates between US\$1,600 and US\$3,000 a month from copy sales and subscriptions, depending on how many subscriptions are due. The newspaper has broken even or made a small profit for most of 2003. However, while it is able to pay for day-to-day expenses, it cannot yet afford to invest in maintaining or upgrading its equipment or facilities.

The other daily paper initially received its main source of income from USAID, which bought 1,500 copies of the newspaper each day for distribution in West Timor. That ended, but revenue raised through that period enabled the paper to remain afloat until January 2003. In 2002 the paper generated approximately US\$2,000 a month from advertising. This was only enough to cover salaries. The operating costs were approximately US\$13,500 a month. One hundred per cent of this paper's income is derived from newspaper sales, advertising, and printing services. From June to August 2003 the newspaper generated about US\$10,000–13,000, about US\$8,000 of which was advertising revenue.

Circulation

One daily newspaper prints 700 copies a day. Four hundred and fifty of these are distributed to subscribers (including around 100 in the districts), 50–150 are sold through agents in Dili and 100 are distributed by micro let to agents in the districts Lospalos, Ermera, Maliana, Manatutu, Suai, Baucau, Same and Viqueque.

The other daily paper prints 1,500 copies each day. The market absorbs about 950 copies each day, including circulation in Lospalos, Baucau, Viqueque, Manatutu, Aileu, Same, Ainaro, Ermera, Liquica, Maliana, and Oecusse. There were 550 regular subscribers by September 2003, and about 400 copies were sold by street sellers. Circulation can increase revenue by about US\$4,500 each month (gross) but it can also yield bad debts. Now every day a young debt collector circulates Dili and comes back with retrieved debts in hand. By this effort the newspaper decreased new bad debt by 90 per cent in November 2003.

There are no statistics on the circulation of other papers; *Talitakum* was supported by grant funding for many years and

so many editions were freely available from a range of different NGOs and drop-off points.

Readership

No available data

Online/digital publishing

At the moment no newspapers publish online – a few have websites, but as most Timorese cannot access the internet except through international organisations with offices and phone lines, there is not much of a market, and few skilled web developers.

Ownership

One daily newspaper is owned by a publishing company, and one is owned by a not-for-profit consortium, the three weekly newspapers are also run by not-for-profit consortiums as far as we know (no public records are available in East Timor). We're not sure about the sports paper.

Media/press laws and copyright

The media regulatory framework is complex and contradictory. It is made up of pre-existing Indonesian legislation, UNTAET regulations and the newly elected government's legislation. These laws are further affected by the Constitution and the international protocols and conventions that the government has signed. Defamation and libel law is complex in any country, and in East Timor this is multiplied by the many legal systems the judiciary must refer to in its judgments. In general media outlets don't have legal staff or journalists with legal expertise. This is a critical issue for all media outlets across the world in an era of heightened litigious activity – and more so for East Timor media outlets with limited income and few skilled journalists.

Internews is facilitating a media law reform strategy with media managers and leading journalists to adapt the Indonesian Press law to meet the needs of the Timorese community and media environment.

Distribution

Newspapers are hand delivered in Dili, and distributed to the districts by small buses, which are locally owned and run.

Postal issues

The postal system is very poor and unreliable in East Timor; most post is delivered in person, since most streets have no names let alone house numbers.

Taxes

Newspaper profits are taxed at 30%. This is the standard rate; newspaper companies receive no tax concessions.

State support

No state or government subsidy initiatives or incentives planned.

New or planned legislation

There are rumours that the government may impose Portuguese-language quotas, and may regulate the types of income sources available to print and electronic media.

Other factors

Timorese journalists are keen to establish a press council and are in the process of debating what this should look like. They are supported by Internews.



POPULATION

Population by age and sex

	All individuals		Male		Female		Households 000
	000	%	000	%	000	%	
Children	274	35	142	36	132	34	168
16-24	165	21	88	22	77	20	
25-34	130	17	61	15	69	18	
35-44	89	11	46	12	43	11	
45-54	60	8	28	7	31	8	
55-64	34	4	16	4	18	5	
65+	35	4	16	4	19	5	
Total	787	100	398	100	389	100	

Source: Suco Survey 2001

Households

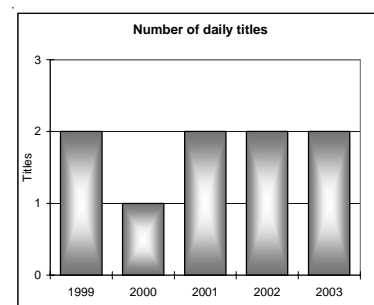
Occupancy	Households 000	%
3 people	70	42
4 people	78	46
5 or more people	20	12
Total	168	100

Source: Suco Survey 2001

NUMBER OF TITLES AND CIRCULATION

	1999	2000	2001	2002	2003	Change (%)	
						99/2003	2002/03
Number of titles							
National dailies	2	1	2	2	2	0.00	0.00
National non-dailies	1	1	1	2	4	300.00	100.00
Total annual sales (thousands of copies)							
Dailies	-	374	749	624	-	-	-
Non-dailies	-	936	936	312	-	-	-

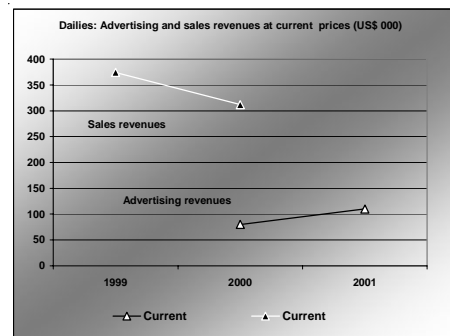
Source: Internews



MORE FACTS

	1999	2000	2001	2002	2003	Change (%)	
						99/2003	2002/03
Advertising revenues (US\$ 000)							
Dailies	-	-	-	80	110	-	37.50
Non-dailies	-	-	4	12	24	-	100.00
Sales revenues (US\$ 000)							
Dailies	-	-	374	312	-	-	-
Non-dailies	-	374	374	499	-	-	-

Source: Internews



Newsprint costs (US\$)

	2000	2001	2002
Newsprint costs (average per month)			
US\$	1,500	2,000	2,200

Source: Internews

Top dailies (2003)

Title	Publisher	Circulation	Cover price US\$
Timor Post	Timor Post Group	2,000	0.50
Suara Timor Lorosae	Timor Tatoli Naroman Foundation	1,250	0.50

Source: PANPA Yearbook 2003, WAN

Top advertising categories (2002)

Advertising sector	% of display ad revenue
Private companies	60
Government	20
NGOs	10
Small businesses	10

Source: Media sales departments

Top advertiser (2003)

ANZ Bank

Top publishing companies (2002)

(listed in alphabetical order)

Beran Timor
Timor Tatoli Naroman Foundation
Kdadalak Media Cooperative

Source: Media sales departments

Employment & salary

	2000	2001	2002	2003
Total no. of journalists	100	108	102	50
Part-time journalists	-	-	-	20
Total no. of employees	112	118	122	80
Total salary costs				
US\$	10,200	11,100	11,420	80,000

Source: Internews

Internet publishing (No. of online editions)

	2001	2002
Dailies	2	2

Source: Internews

Cover prices (2002)

	US\$
Single copy	0.50

General economic situation

GDP total US\$42.65 billion; GDP per capita US\$3,111 (purchasing power parity; 2002). Consumer price index 112.5 (2002).

Performance of newspapers vs. other media

Most media outlets in the country are privately owned. Ecuador has five main national TV stations, and several other regional channels. Cable TV is making big inroads in Ecuador. Radio is an important part of community life, particularly in the rural regions where local stations are used to pass news and messages between villages. There are hundreds of such stations across the country, the majority broadcasting on AM. Religious broadcasting from evangelical Christians is also widespread.

Performance of different types of newspapers

Ecuador produces several high-quality daily newspapers. There are 11 regional editions of the daily *La Hora*, with a total aggregate circulation of over 100,000 copies. The

publishing company of *La Hora* has three printing plants in three different regions of the country. The gravity of the broadsheets is counterbalanced by a tabloid press.

Media/press laws

Four articles in the criminal code penalize defamation of the president, court officials, or corporate heads, although charges are rarely brought against journalists under these laws. Under a law which requires the media to give the government free space or air time, the government can and has required TV and radio to broadcast government-produced programmes featuring the president and other top officials. During the state of emergency that occurred in Sucumbios and Orellana Provinces in 2002, the government ordered four radio stations to stop broadcasting anything other than music for three days, in the interest of public security.

Sources: CIA - *The World Factbook 2003*; *Freedom House*; *BBC*; *WAN from public sources*

POPULATION & MORE FACTS

Population by age and sex

	All individuals		Male		Female	
	000	%	000	%	000	%
0-14	4,781	35	2,430	36	2,351	34
15-64	8,315	61	4,116	60	4,199	61
65+	614	4	284	4	330	5
Total	13,710	100	6,830	100	6,880	100

Source: CIA - *The World Factbook 2003*

	1999	2000	Change (%) 1999/2000
Number of titles			
Total dailies	36	36	0.00
Non-dailies	40	40	0.00
Circulation (000)			
Total dailies	1,220	1,220	0.00

Source: UNESCO

Top ten dailies (2003)

Title	Publisher	Cover Price	
		US\$	Format
El Comercio	-	-	Broadsheet
Hoy	-	0.35	Broadsheet
El Tiempo	-	-	-
Ultima Noticias	-	-	Tabloid
El Universo	-	-	Broadsheet
El Expreso	Graficos Nacionales S.A.	-	-
La Hora	-	-	-
El Telegrafo	-	-	Broadsheet
La Prensa	-	-	-
La Segunda	-	-	Tabloid

Source: WAN from public sources

General economic situation

GDP total US\$289.8 billion; GDP per capita US\$3,878 (purchasing power parity; 2002). Consumer price index 104.3 (2002).

Performance of newspapers vs. other media

Egypt is a major regional media player, mainly in satellite TV. The Egyptian Space Channels are widely-watched across the Arab-speaking world. Egypt aims to attract foreign media companies to its Free Media Zone, launched in 2000, by offering the use of its media infrastructure and economic support. The Ministry of Information owns and operates all ground-based domestic TV and radio stations. The Egyptian Radio and Television Union (ERTU) works in affiliation with the Ministry of Information to operate all eight government-owned TV stations in Egypt, as well as two satellite stations and 19 local and regional stations. ERTU is widely recognized as the largest producer of TV programs in the Arab world.

Two private satellite stations, Al Mihwar and Dream TV, began broadcasting in 2001 and operated without direct government interference. The government had a 20% financial stake in the first and a 10% stake in the second. The percentage

of residents who receive satellite TV broadcasts is small, but many coffee shops and other public places offer satellite TV.

Performance of different types of newspapers

Egyptian publications can be divided into four categories: state-owned, party-owned, domestic-licensed independent and foreign-licensed independent. There are 14 state-owned newspapers, including the three main dailies, *Al Ahram*, *Al Akhbar* and *Al Gomhuriya*. The government owns stock in them, and the president appoints their editors-in-chief. *Al Ahram* is the largest newspaper in Egypt and also is the largest Arabic paper in the world with Middle East, international and North America editions. Its circulation is nearly 1 million copies. *Al Ahram* is also distributed across the country and throughout the Middle East. *Al Gomhuriya* receives national distribution. Four of the 14 papers are published in English or French and the remaining 10 are published in Arabic. Two of the 14 are evening newspapers and nine are weeklies. There are 38 state-owned magazines and periodicals. Most party newspapers are weeklies, with the exception of the main opposition dailies *Al-Wafd* and *Al-Ahrrar*, both of which have small circulations. Many of the foreign-licensed publications are tabloid papers.



Al Alam Al Youm, the leading financial newspaper in Egypt, has an international circulation of 70,000.

Newspaper launches/closures

In 2002, the Higher Council for the Press approved the publication of 10 new periodicals and changes to the names of two existing publications. No publications lost the right to publish. All 10 new newspapers were independent.

Advertising

Egypt's advertising sector is one of the fastest-growing in the region.

Circulation

The government uses its monopolistic control of newsprint to limit the output of opposition publications.

Ownership

The Constitution restricts ownership of newspapers to public or private legal entities, corporate bodies, and political parties. There are numerous restrictions on legal entities that seek to establish their own newspapers, including a limit of 10% ownership by any individual.

Media/press laws

In 2002, there were no cases of censorship of foreign-licensed publications. The Penal Code, Press Law, and Publications Law govern press issues. The Penal Code stipulates fines or imprisonment for criticism of the president, members of the government, and foreign heads of state. The Press and Publication Laws provide protection against malicious and unsubstantiated reporting. The government continues to charge journalists with libel. If he were found to be negligent, an editor-in-chief can be considered criminally responsible for libel contained in any portion of the newspaper.

All party newspapers are required by law to reflect the platform of their parties.

Distribution

The government holds a monopoly on the printing and distribution of newspapers, including those of the opposition parties. The distribution of foreign newspapers and magazines is allowed with government permission. Because of the difficulties in obtaining a license, several publishers of newspapers and magazines aimed at a domestic audience obtained foreign licenses and distribute their products as 'foreign' publications. Most of these publications are actually printed in a free-trade zone inside Egypt; however, the Department of Censorship in the Ministry of Information has the authority to censor, confiscate or ban such publications.

State Support

Opposition political parties publish their own newspapers but receive a subsidy from the government, and, in some cases, subsidies from foreign interests as well.

Employment

All journalists must be members of the Syndicate of Journalists and all are required to have at minimum a college education. Approximately 45% of journalists have degrees in journalism, political science or mass communication, and the remaining 55% have degrees in other fields. Most major universities have mass communication programs. Some institutes are beginning to offer professional training programs, such as the Akhbar El Youm Academy and the Al Ahram Regional Press Institute.

Sources: CIA - The World Factbook 2003; BBC; US State Department; Crossover International Inc.

POPULATION & MORE FACTS

Population by age and sex

	All individuals		Male		Female	
	000	%	000	%	000	%
0-14	25,312	34	12,965	34	12,347	33
15-64	46,240	62	23,375	62	22,865	62
65+	3,167	4	1,360	4	1,807	5
Total	74,719	100	37,700	100	37,019	100

Source: CIA - The World Factbook 2003

	1999
Number of titles	
Total dailies	16
Non-dailies	45
Circulation (000)	
Total dailies	2,080
Non-dailies	1,371

Source: UNESCO

Top ten dailies (2003)

Title	Publisher	Circulation (000)
Al-Ahram (Pyramids)	State-owned	1,000
Al-Akhbar (The News)	State-owned	-
Al-Gomhuriya (The Republic)	State-owned	-
Al-Messa	-	-
Al-Ahali	-	-
Al-Wafd	Al-Wafd Party	-
Al-Ahrar	-	-
Alalam Alyoum	-	-
Al Shaab	-	-
Progres Egyptien	(in French)	-

Source: WAN from public sources

General economic situation

GDP total US\$29.41 billion; GDP per capita US\$4,545 (purchasing power parity; 2002). Consumer price index 103.8 (2001).

Performance of newspapers vs. other media

There are 16 television stations. Five independent and one government-owned and operated VHF television stations reach most areas of the country. Eight independent UHF stations serve San Salvador, and several can be received as far as 30 miles from the capital. Two cable television systems cover much of the capital and the major cities of San Miguel, Santa Ana, and Sonsonate. All carry major national stations and a wide range of international programming. Approximately 150 licensed radio stations broadcast on the FM and AM bands.

Performance of different types of newspapers

There are five daily newspapers with a combined daily circulation of more than 250,000 copies. The sixth daily

newspaper, *El Faro*, is available online. There are several provincial papers.

Advertising

Advertising agencies responsible for placement of government-funded public service announcements were biased in favour of media companies that generally supported government policy.

Media/press laws

Article 24 of the Law of National Defence requires journalists to reveal their sources if the 'national interest' is at stake. Article 46 of the Enabling Law of the State Audit Court allows the court to keep secret its audits of government officials handling taxpayers' money, which could impede journalists' ability to investigate corruption and to hold officials accountable.

Source: CIA - The World Factbook 2003; Freedom House; US State Department; WAN from public sources

POPULATION & MORE FACTS

Population by age and sex

	All individuals		Male		Female	
	000	%	000	%	000	%
0-14	2,398	37	1,224	39	1,174	35
15-64	3,744	58	1,778	56	1,966	59
65+	329	5	147	5	182	5
Total	6,471	100	3,149	100	3,322	100

Source: CIA - The World Factbook 2003

	2002
Number of titles	
National dailies	5
Circulation (000)*	
National dailies	250

Source: WAN from public sources

* Estimate by the US State Department

Top dailies (2003)

Title	Cover Price	
	Colones	US\$
El Diario de Hoy	-	-
La Prensa Grafica	-	-
Co Latino	1.30	0.15
El Mundo	-	-
La Noticias	-	-

Source: WAN from public sources

ECONOMIC DATA

Main economic indicators 1996-2006

	1996	1997	1998	1999	2000	2001	2002
1 US\$=	8.75						
	Colones at 2002 rate						
Gross Domestic Product (Colones billion)							
at current prices	90	97	105	109	115	121	125
% change	8.6	7.9	7.8	3.8	5.4	5.1	3.5
at 2002 prices	99	103	108	112	115	116	118
% change	-1.1	3.3	5.2	3.3	3.0	1.2	1.6
Gross Domestic Product per capita (Colones 000)							
at current prices	15.6	16.5	17.4	17.7	18.3	18.9	19.5
at 2002 prices	17.2	17.4	17.9	18.1	18.3	18.2	18.5
Population							
Millions	5.8	5.9	6.0	6.2	6.3	6.4	6.4
Consumer Price Index							
2002=100	85.9	89.8	92.0	92.5	94.6	98.2	100.0
%change	9.8	4.5	2.5	0.5	2.3	3.8	1.8

Source: IFS, ZenithOptimedia

EQUATORIAL GUINEA

General economic situation

GDP total US\$1.27 billion; GDP per capita US\$2,485 (purchasing power parity; 2002). Consumer price index 106 (2002).

Performance of newspapers vs. other media

Radio was the most important and influential medium of mass communication. During the year, the Government continued to effectively dominate domestic radio broadcasting. It owned and operated the station Radio Malabo. The President's son, Teodorino Obiang Nguema, who also was Minister of Forestry, Environment, and Fisheries, owned the only private local radio station, Radio Asonga. The Government has not approved the one or two other applications for private radio stations that have been pending for several years. Unlike the previous year, no radio stations were shut down.

The only domestic television station was government-controlled, and broadcast only a few hours a day. Television

Asonga, owned by President Obiang and run by his son in coordination with Radio Asonga, broadcast by cable only in Bata. Foreign cable television was available, and offered the Cable News Network (CNN), French news, movies, sports events, and cartoons; however, relatively few citizens could afford cable. Satellite reception was increasingly available. International electronic media was available and includes Radio France International, which broadcast in Malabo, and Radio Exterior, the international short-wave service from Spain.

Performance of different types of newspapers

A few small, independent newspapers publish sporadically, but nearly all print media are state-run and tightly controlled. No newspaper managed to publish more than about six issues during the year, due to a lack of resources. There were five general-interest newspapers that published irregularly: *La Gaceta*, a Malabo-based monthly publication with informal connections to the government; *El Correo Guineo Ecuatoriano*, a bimonthly newspaper published by the Gaceta group; *La*



Opinion, an opposition newspaper published every two to three weeks; *El Tiempo*, an opposition newspaper; and *Ebano*, a publication of the Ministry of Information, Tourism, and Culture, which appeared approximately twice a month. Students at the National University have published a magazine, *AYO*, and the Guinean-Hispano Cultural Center also has published a monthly cultural review, *El Patio*. The PDGE published *La Voz del Pueblo*, and the opposition CPDS published *La Verdad*. *La Gaceta* has a contract with the government to publish laws and regulations adopted by the administration regularly.

Newspaper launches/closures

Earlier in 2002, the government authorized the publication of *La Nación*, a new independent weekly owned by Nolasco Ndong. The information minister had rejected the publication's initial name — *La Liberación* — which, he said, "undermined the democratic principles" of President Obiang's regime. Since Nolasco Ndong went into exile, however, it is not clear whether the weekly is operating.

Advertising

The government prefers to buy expensive advertising space to praise the country in European newspapers.

Circulation

There is no printing press in the country and newspapers are published in the form of photocopies. Paper, imported from Cameroon, is very expensive.

Media/press laws

The law authorizes government censorship of all publications. The Ministry sometimes required publishers to submit copy for approval prior to publication during the year. There was very limited availability of foreign publications. Official news is totally inaccessible to the private press. Very few civil servants or state officials agree to give interviews to private sector publications.

Employment

All journalists must be registered with the Ministry of Information. According to the Ministry, in 2001 there were 18 independent reporters registered, and between 35 and 45 reporters employed by the official party or government.

Source: CIA – *The World Factbook 2003*; US State Department; *Freedom House*

POPULATION & MORE FACTS

Population by age and sex

	All individuals		Male		Female	
	000	%	000	%	000	%
0-14	215	42	108	43	107	41
15-64	276	54	132	53	144	55
65+	20	4	9	4	11	4
Total	511	100	249	100	262	100

Source: CIA - *The World Factbook 2003*

ERITREA

General economic situation

GDP total US\$3.3 billion; GDP per capita US\$756 (purchasing power parity; 2002). Consumer price index 115 (2001).

Performance of newspapers vs. other media

After September 2001, the government controlled all nonreligious media, including, one radio station, one television station, one of only two newspaper printing presses in the country and the news agency Erina. There were no private radio or television stations.

Performance of different types of newspapers

The private-sector press no longer exists. Prior to September 2001, eight independent newspapers published on a weekly or biweekly basis, with an estimated circulation of 45,000. In September 2001, the government closed these publications on the grounds of national security, and religious publications were banned during the year. There were no independent print media operating in the country by the end of 2002. The government controls three newspapers, *Hadas Eritrea* published three days a week, the English weekly Arabic

Eritrea Profile, and the weekly youth paper *Tirigta*.

Media/press laws

After the independent press was closed in September 2001, the government formed a committee to revise the Press Law. The law does not allow private ownership of broadcast media or foreign influence or ownership of any media. The law requires that all newspapers obtain a license from the Ministry of Information before publication and that all reporters register with the Ministry. The law in theory allows individuals to publish newspapers and magazines. The press law forbids the local reprinting of articles from banned publications. The government continued to restrict the right of the religious media to comment on politics or government policies.

Distribution

The government has the authority to ban the import of any foreign publication, although it had not done so. In 2002, some Western periodicals were available regularly at several bookshops and from street vendors in Asmara.

Sources: CIA – *The World Factbook 2003*; US State Department

POPULATION

Population by age and sex

	All individuals		Male		Female	
	000	%	000	%	000	%
0-14	1,950	45	978	45	972	44
15-64	2,268	52	1,121	52	1,147	52
65+	145	3	72	3	73	3
Total	4,363	100	2,171	100	2,192	100

Source: CIA - *The World Factbook 2003*

Commentary - Estonian Newspaper Association (EALL)

Newspaper circulation and readership were stable in 2003, and newspapers retained their position. There were no major changes to the market, but the last broadsheet in Estonia changed to a tabloid version.

retail copy sales were adopted. VAT for subscriptions will go up from 0% to 5%, and the VAT for single copy sales will go down from 18% to 5%. The amendments will take effect on May 1, 2004.

The renewal of the Postal Act was initiated in 2003, and the VAT Act amendments concerning newspaper subscription and

The government also plans a new mechanism for handing out the annual Kroon 15 million postal subsidy for rural distribution.

POPULATION

Population by age and sex

	All individuals		Male		Female		Households
	000	%	000	%	000	%	
Children	127	9	65	10	62	8	606
15-24	204	15	104	17	100	14	
25-34	191	14	97	16	94	13	
35-44	183	13	90	14	93	13	
45-54	195	14	92	15	103	14	
55-64	161	12	72	12	89	12	
65+	295	22	104	17	191	26	
Total	1,356	100	624	100	732	100	

Source: Statistical Office of Estonia

Newspaper reach (%)

	Daily reach
All adults	66.6
Men	66.6
Women	66.6
MHS	66.0

Source: TNS Emor, National Readership Survey 2003

Age structure of readership

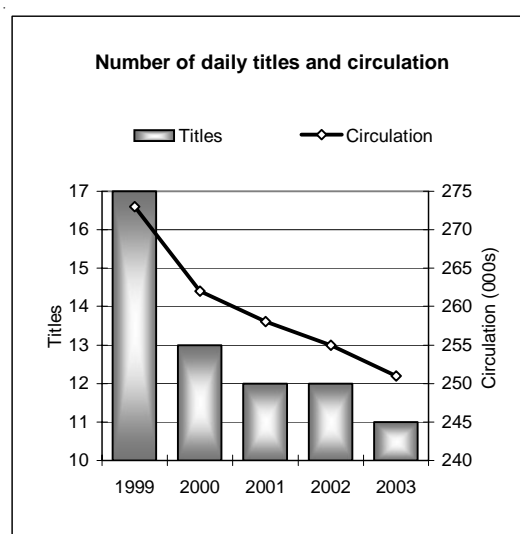
Age	% of readership	% of daily reach within age group
15-19	9.9	65.5
20-29	18.5	68.0
30-39	17.7	67.4
40-49	18.9	67.5
50-59	15.8	69.2
60-74	19.2	62.4

Source: TNS Emor

NUMBER OF TITLES AND CIRCULATION

	1999	2000	2001	2002	2003	Change (%)	
						99/2003	2002/03
Number of titles							
Total dailies	17	13	12	12	11	-35.29	-8.33
National dailies	7	6	6	6	6	-14.29	0.00
Regional dailies	9	6	6	6	5	-44.44	-16.67
Local dailies	1	1	0	0	0	-100.00	-
Non-dailies	50	49	52	50	47	-6.00	-6.00
National non-dailies	32	28	28	27	24	-25.00	-11.11
Regional non-dailies	8	11	11	11	23 *	-	-
Local non-dailies	10	10	13	12	-	-	-
Free papers	8	8	8	8	7	-12.50	-12.50
Circulation (000)							
Total dailies	273	262	258	255	251	-8.06	-1.57
National dailies	195	198	199	196	199	2.05	1.53
Regional dailies	76	62	59	59	52	-31.58	-11.86
Local dailies	2	2	0	0	0	-100.00	-
Non-dailies	419	333	344	341	336	-19.81	-1.47
National non-dailies	368	280	275	273	266	-27.72	-2.56
Regional non-dailies	35	36	36	35	70 *	-	-
Local non-dailies	16	17	33	33	-	-	-
Free papers	180	203	154	129	138	-23.33	6.98
Total annual sales (millions of copies)							
Dailies	75.5	74.8	71.5	70.4	70.0	-7.28	-0.57
Non-dailies	22.9	23.8	22.8	21.2	22.1	-3.49	4.25
Free papers	8.3	8.5	6.5	4.2	6.8	-18.07	61.90

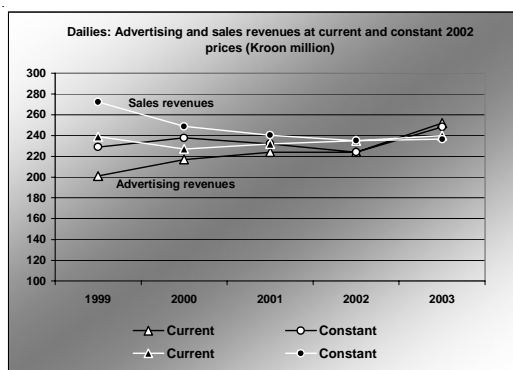
* combined regional and local figure





MORE FACTS

	1999	2000	2001	2002	2003	Change (%)	
						99/2003	2002/03
Advertising revenues (Kroon million)*							
Dailies	201	217	224	224	252	11.44	12.50
Dailies §	229	238	232	224	248	1.32	10.84
Non-dailies	94	98	114	115	131	21.28	13.91
Free papers	6	7	14	13	16	133.33	23.08
Online	4	4	3	3	3	-25.00	0.00
Sales revenues (Kroon million)							
Dailies	239	227	232	235	240	-2.93	2.13
Dailies §	272	249	240	235	236	-11.75	0.62
Non-dailies	141	147	121	113	115	-14.18	1.77
Volume of advertising sold (number of newspaper ads)							
Total	-	247,925	-	-	25,500**	-	-



Source: Emor, EALL

§ at constant 2002 prices

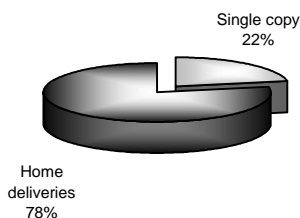
* Includes classified and inserts; excludes production costs and agency commission; after discounts of 10%-20%

** Dailies and non-dailies only

Type of newspaper sales (%)

	Single copy	Home/postal deliveries
1999	38	62
2000	24	76
2001	20	80
2002	20	80
2003	22	78

Type of newspaper sales in 2003 (%)



Contribution of classified, display and insert advertising to total advertising income (%)

	1999	2000	2001	2002	2003
Display	72	72	78	76	73
Classified	24	24	16	16	15
Inserts	4	4	6	8	12

Distribution and newsprint costs

	1999	2000	2001	2002	2003
As % of average cover price					
Single copy sales	32	30	28	30	31
Home deliveries	27	15	26	28	28
Postal deliveries	29	20			
Average distribution cost per copy					
Subscription Kroon	1.50	0.90	1.73	1.77	1.77
Single copy Kroon	2.10	1.25	1.60	1.75	1.75
Newsprint costs (average per ton)					
Kroon	6,700-7,100	8,000	8,650	8,000	7,700

Internet publishing (No. of on-line editions)

	1999	2000	2001	2002	2003
Dailies	7	8	10	11	10
Non-dailies	18	15	26	29	30

Employment & salary (dailies only)

	2002	2003
Total no. of Journalists	496	503
Total no. of Employees	811	829
Total salary costs		
Kroon (000)	113,500	144,000
Euro (000)	7,250	53,000

Top ten dailies (2003)

Title	Publisher	Circulation (000)	Readership (000)	Cover Price		Format	Full page rate (Kroon)	
				Kroon	US\$		Mono	Colour
SL Õhtuleht	AS SL Õhtuleht	66	283	7.00	0.42	Tabloid	33,600	42,400
Postimees	AS Postimees	64	219	8.00	0.48	Tabloid	42,000	42,000
Eesti Päevaleht	AS Eesti Päevaleht	35	146	10.00	0.60	Tabloid	42,000	46,700
Äripäev	Äripäeva Kirjastuse AS	21	78	15.00	0.90	Tabloid	44,900	44,900
Pärnu Postimees	AS Pärnu Postimees	15	43	5.00	0.30	Tabloid	12,900	16,700
Sakala	Sakala Kirjastuse AS	11	34	5.00	0.30	Tabloid	14,300	15,700
Molodjož Estonii	AS Moles	10	84	5.00	0.30	Tabloid	13,600	19,600
Virumaa Teataja	AS Viru Press	9	34	5.00	0.30	Tabloid	13,200	14,500
Põhjarannik / Severnoje Poberezhje	AS PR Põhjarannik	8	27	4.00	0.24	Tabloid	12,600	15,000
Meie Maa	OÜ Saaremaa Raadio	8	-	5.00	0.30	Tabloid	11,300	-

Source: EALL

Newspaper colour capability & formats (dailies)

Number of:	1999	2000	2001	2002	2003
4-colour newspapers	9	12	11	11	10
Broadsheets	3	1	1	1	0
Tabloids	14	12	11	11	11

Cover prices

	Kroon
Single copy	4.00-15.00
Subscription	2.90-8.00

**Top ten advertising categories* (2003)**

Advertising sector	% of display ad revenue
Retail	7.6
Auto	7.0
Recruitment	5.9
Concerts/festivals/shows	5.2
Sport/recreation	4.6
Mobiles/telecoms	4.6
Real estate	3.9
Computers	3.9
Travel	3.0
Theatre/art/culture	2.9

Source: TSN Emor, Adex

* National daily newspapers

Top ten publishing companies (2003)

(ranked by total revenue)
AS Postimees
Äripäeva Kirjastuse AS
AS SL Õhtuleht
AS Eesti Päevaleht
Eesti Ekspressi Kirjastuse AS
AS Maaleht
AS Pärnu Postimees
OÜ Vene Meedia
OÜ Moles
OÜ Zeromark

Source: EALL

Top ten advertisers* (2003)

Advertiser
A-Selver
Kesko Food
Kadaka Säästumarket
EMT
Radiolinja
Indoor Group
Prisma Peremarket
Eesti Ühispank
Info-Auto
Inpoc

Source: TSN Emor, Adex

* All newspapers

Media consumption * (minutes per day)

	1999	2000	2001	2002	2003 **
Radio	208	209	209	209	292
Television †	234	250	249	262	231

Source: TSN Emor

* Population aged 12-74

** Different measurement system used, so figures not directly comparable with previous years

† includes video

ADVERTISING EXPENDITURE & ECONOMIC DATA**Main economic indicators 1996-2002**

	1996	1997	1998	1999	2000	2001	2002
1 US\$= 16.61 Kroons at 2002 rate							
Gross Domestic Product (Kroons million)							
at current prices	52,423	64,045	73,538	76,327	87,236	96,571	106,496
% change	28.2	22.2	14.8	3.8	14.3	10.7	10.3
at 2002 prices	73,801	81,550	86,577	86,966	95,563	100,034	106,496
% change	4.1	10.5	6.2	0.4	9.9	4.7	6.5
Gross Domestic Product per capita (Kroons)							
at current prices	35,662	43,866	51,425	54,133	63,676	69,979	77,171
at 2002 prices	50,205	55,856	60,543	61,678	69,754	72,489	77,171
Population							
Millions	1.5	1.5	1.4	1.4	1.4	1.4	1.4
Consumer Price Index							
2002=100	71.0	78.5	84.9	87.8	91.3	96.5	100.0
% change	23.1	10.6	8.2	3.3	4.0	5.8	5.8
Ad.spend as a % of GDP							
	0.79	0.88	0.96	0.84	0.77	0.78	0.76
Advertising Expenditure Growth (%)							
at current prices	47.7	35.8	25.9	-9.8	5.5	11.2	8.4
at 2002 prices	20.0	22.8	15.9	-13.0	2.2	5.2	4.7

Source: IFS, ZenithOptimedia

Advertising expenditure

(Kroon million, in current prices)

	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
Newspapers	190	270	333	305	308	361	368	414	444	477	508
Magazines	37	46	82	81	92	98	108	111	119	124	130
Television	110	150	182	130	155	165	195				
Radio	49	55	70	77	76	75	79				
Outdoor	29	43	40	42	31	34	44				
Internet	-	-	3	4	13	19	20				
Total	415	563	709	640	675	751	814	913	991	1,065	1,138

Source: 1996-2006 ZenithOptimedia

Notes: Excludes classified and production costs, includes agency commission, after discounts



Research

Readership is measured by: TNS Emor, Saar Poll

Methodology: Emor carries out the national readership survey once a month in the course of the Emor bimonthly CAPI-bus survey. Media usage and background data are gathered by using the computer assisted personal interviewing (CAPI) method. The national readership survey is a continuous survey in the course of which 500 Estonian residents aged 15-74 are interviewed every month.

Saar Poll conducts the annual readership survey among 3,155 respondents.

Taxes

VAT on: sales 0/18%* advertising 18%
 newsprint 18% plant 18%
 composition 18%
 (standard VAT rate 18%)

* subscription sales have 0% VAT, single copy sales 18%. The tax rate on profits for all companies is 26%, although this tax does not apply if profits are reinvested.

Subsidies

Subsidies are granted to cultural periodicals, and for distributing newspapers to rural regions.

Subsidies (Kroon million)

	1999	2000	2001	2002	2003
Total	26	26	26	26	28

Discounts

on: post 0 rail 0 telephone 0 telegraph 0

Ownership

Does any law exist governing publishing-house ownership, or the registration of shares in newspaper-publishing companies? No

Is there any law prohibiting or restricting foreign companies or individuals from owning shares, and in particular, the majority of shares, of domestic daily newspapers? No

Is there any law prohibiting daily newspaper or periodical publishers from operating radio or television stations in the same locality? Yes. No company or person may simultaneously own a TV station, a radio station, and a daily or weekly paper.

So as to guarantee disclosure and transparency in the capital structure and to avert silent partnerships, is there a law or rule making it possible to determine who actually owns a publishing company? No

Is there an antitrust law limiting concentration in the daily press? No

Is further regulation of media concentration expected? No

General economic situation

GDP total US\$48.53 billion; GDP per capita US\$729 (purchasing power parity; 2002). Consumer price index 104 (2003).

Performance of newspapers vs. other media

Radio remained the most influential medium for reaching citizens, especially those who live in rural areas. Although the law allows for private radio stations, regulations were not implemented, and there were no truly independent radio stations. Two non-governmental stations, Radio Fana, a station controlled by the ruling coalition, and the TPLF radio, which broadcast in the Tigrigna language from Mekele, had close ties to the government. Broadcasting time on the state-run Radio Ethiopia was sold to private groups and to individuals who wanted to buy spots for programs and commercials. The government operated the sole television station, and news was controlled tightly. The state-run ETV continued to broadcast "TV Africa," which was contracted from a South African company. There were no restrictions on access to international news broadcasts. Ownership of private satellite receiving dishes and the importation of facsimile machines and modems were permitted; however, access to this technology was limited by its cost.

Performance of different types of newspapers

There were a total of 81 newspapers, 22 magazines, and two news agencies. Out of the total number of newspapers, there were approximately 34 private Amharic-language weekly newspapers, seven English-language weeklies, and one English-language daily. Circulation figures ranged from 2,000 to 20,000 copies each. In addition to the private press, there were three ruling party coalition papers, in Amharic, Oromifa, and Tigrigna, which had a total circulation figure of approximately 70,000. There were two government dailies, the English-language *Ethiopian Herald* (circulation 40,000) and the Amharic *Addis Zemen* (circulation 50,000), and a government Arabic-language weekly, *Al-Alam* (circulation 10,000).

The majority of private papers as well as government papers were printed at government-owned presses. However, a few private papers started using smaller private printing presses, one of which was owned by the publisher of the *Daily Monitor*. All publications of the Ethiopian Peoples' Revolutionary Democratic Front were printed at the party-run Mega Publishing Enterprise. Police had the

authority to shut down those printing presses without a court order.

Newspaper launches/closures

The government did not ban or shut down any newspaper or publication in 2002.

Media/Press Laws

The Ministry of Information and Culture required that newspapers show a bank balance of US\$1,200 (10,000 Birr) at the time of their annual registration for a license to publish. Although the requirement was not enforced strictly, the Ministry of Information and Culture noted publicly that many papers were not in compliance and could be closed down on short notice. Permanent residency was also required to establish a newspaper.

The office of the government spokesperson and information sections of government ministries routinely refused to respond to queries from the private press and limited their cooperation with the press to the government-run Ethiopian News Agency, the ruling party-run Walta news agency, and correspondents of international news organizations. Generally the government permitted private newspapers and news organizations to attend government briefings and press conferences, and some government officials provided information and granted interviews to private journalists. However, there were instances when members of the independent press were barred from attending press conferences given by government agencies.

Distribution

Newspapers critical of government leaders and their policies were available widely in the capital but scarce elsewhere, although circulation in the regional capitals increased during the year.

State Support

The official media, including broadcast, wire service, and print media received government subsidies; however, they legally were autonomous and responsible for their own management and partial revenue generation.

Sources: CIA - *The World Factbook 2003*; US State Department; WAN from public sources

POPULATION & MORE FACTS

Population by age and sex

	All individuals		Male		Female	
	000	%	000	%	000	%
0-14	29,815	45	14,944	45	14,871	45
15-64	34,859	52	17,474	53	17,385	52
65+	1,883	3	840	3	1,043	3
Total	66,557	100	33,258	100	33,299	100

Source: CIA - *The World Factbook 2003*

Top dailies (2003)

Title	Publisher (Language)	Circulation	Cover Price	Format
		(000)	Birr	
Addis Zemen	Ethiopian Press Agency (in Amharic)	50	0.50	Broadsheet
The Ethiopian Herald	Ethiopian Press Agency (in English)	40	0.50	Broadsheet
Elatawi Addis	Unity College (in Amharic)	-	-	Broadsheet
The Daily Monitor	(in English)	2	1.50	Tabloid
The Monitor	(in Amharic)	-	-	-

Source: WAN from public sources

General economic situation

GDP total US\$4.822 billion; GDP per capita US\$5,555 (purchasing power parity; 2002). Consumer price index 102 (2002).

Performance of newspapers vs. other media

The country's television news production was owned and operated by Fiji One, one of only two national noncable television stations. A trust operating on behalf of the provincial governments owned 51% of Fiji One; the other 49% was owned by private individuals and interests. In 2002, the Prime Minister stated publicly that the market was too small for more than one television station; however, a privately owned Christian station opened early in the year. The government owned the Fiji Broadcasting Corporation, which operated four radio stations. There were several thriving independent radio stations broadcasting in English, Fijian, and Hindi. Under the Television Act, the government is allowed to influence programming content.

Performance of different types of newspapers

Fiji has three daily newspapers publishing seven days a week, the *Fiji Times*, the *Fiji Sun* and the *Daily Post*. The *Fiji Times* is the oldest and biggest in terms of circulation and staff numbers. Its Sunday newspaper the *Sunday Times* has a circulation of 24,000. The government owns a 45% share in the *Daily Post* and has business links to its main competitor,

the *Fiji Sun*. The *Fiji Sun* is independent and is majority owned by the CJ Patel group, Fiji's largest enterprise. The Fijian weekly *Nai Lalakai* (circulation 7,000) and the Hindi weekly *Shanti Dut* (10,000) are both part of the Fiji Times group. The other Fijian weekly is published by the Daily Post.

Media/press laws

Legislation pertaining to the press is contained in the Newspaper Registration Act and the Press Correction Act. Under these acts, all newspapers had to be registered with the Government before they could publish. The acts gave the Minister of Information sole discretionary power to order a newspaper to publish a "correcting statement" if, in the Minister's view, a false or distorted article was published. Should a newspaper refuse to publish the Minister's correction, it could be sued in court and, if found guilty, fined approximately \$500 (FJS\$1,125). Individuals in such cases could be fined, imprisoned for six months, or both. These acts would authorize the government to arrest any person who published "malicious" material. This would include anything the government considered false information, that could create or foster public alarm, or result in "detriment" to the public. However, this authority has never been used.

Sources: CIA - The World Factbook 2003; US State Department; Australian Press Council; PANPA Bulletin

POPULATION & MORE FACTS

Population by age and sex

	All individuals		Male		Female	
	000	%	000	%	000	%
0-14	278	32	142	33	136	31
15-64	557	64	279	64	278	64
65+	33	4	15	3	18	4
Total	868	100	436	100	432	100

Source: CIA - The World Factbook 2003

Top dailies (2003)

Title	Publisher	Circulation (000)	Readership (000)
Fiji Times	The Fiji Times Ltd.	-	-
Fiji Sun	Sun (Fiji) News Ltd.	10	25
Daily Post		-	-

Source: WAN from public sources

	2002
Number of titles	
National dailies	3
National Sundays	2

Source: WAN from public sources

Commentary - *Sanomalehti Liitto (Finnish Newspaper Association)*

Growth in the national economy was faster than in other EU countries and consumers in Finland are still having strong confidence in their personal finances. Consumers are worried with developments in the level of the unemployment rate, which still is 9 percent of the work force. Despite of these facts, GNP grew 1.9 percent in 2003 and the annual inflation rate was as low as 0.9 percent. The Finnish economy was in a better condition than in many other European countries.

Advertising in media increased 2.5 percent, newspaper advertising increasing 2.1 percent. Newspapers' share of media advertising remained at 50 percent.

Newspapers have a very high level of readership in Finland. Totally 87 percent of the population over 12 years are reading newspapers every day. The press also benefits from a developed co-operation among newspapers in the sale of advertising. This co-operation enables them to offer advertisers competitive, cost-effective and nationwide options in advertising because many newspapers are applying a principle of one-order-one-bill. Kärkimedia is a marketing organisation of 30 daily newspapers and Suomen Paikallismediat is a marketing organisation of about 150 local newspapers. Both were very successful in their marketing operations in 2003.

The average circulation of newspapers declined 1.1 percent.

The circulation of dailies declined 1.1 percent. Average circulation of non-dailies, which are published in areas with scattered population, declined 0.1 percent. The total circulation of Finnish newspapers is 3.2 million copies. The great majority i.e. 80 percent of subscribed dailies are delivered to subscribers before 6:30 AM every day.

Newspapers have paid a great deal of attention in developing contents and outlook in order to better appeal to all types of readers. Recent surveys have indicated that 75 percent of readers say that contents of newspapers have either improved or at least remained similar. Readers are also relying on their own subscribed newspaper; 88 percent say that the news in their 'own paper' is very reliable. Many newspapers made changes in the appearance of the paper and publishing houses have invested in better technology in order to be able to produce even more 4-colour pages. At the moment 80 percent of advertising in newspapers have at least one colour.

As in other countries in the world, there is an ongoing discussion of the advantages of smaller (i.e. tabloid) formats over broadsheet. Still most of the biggest newspapers are published in broad sheet format. The biggest Swedish-speaking newspaper changed to tabloid format in March 2004.

Approximately 115 Finnish newspapers have online editions.

POPULATION

Population by age and sex

	All individuals		Male		Female		Households 000
	000	%	000	%	000	%	
0-14	927	18	473	19	454	17	2,382
15-24	650	12	332	13	318	12	
25-34	641	12	328	13	313	12	
35-44	750	14	381	15	369	14	
45-54	807	16	407	16	400	15	
55-64	632	12	311	12	321	12	
65+	799	15	312	12	487	18	
Total	5,206	100	2,544	100	2,662	100	

Source: Statistical yearbook of inland 2003

Households

Occupancy	Households	
	000	%
1 person	907	38
2 people	798	34
3 people	287	12
4 people	249	10
5 or more people	140	6
without children	1,651	69
with children	730	31
Total	2,381	100

Source: Statistical yearbook of Finland 2003

Population by social class and sex

	All adults		Male		Female	
	000	%	000	%	000	%
A + B	359	7	214	8	145	5
C1	625	12	323	13	302	11
C2	1,000	19	370	15	630	24
D	1,131	22	672	27	459	17
E	2066	40	950	38	1116	42
Total	5,181	100	2,529	100	2,652	100

Source: Statistical yearbook of Finland 2003

A+B = Employers and own-account Workers

C1 = Upper-level salaried workers

C2 = Lower level salaried workers

D = Workers

E = Economically inactive

Newspaper reach (%)

	Daily
All adults	87

Source: Intermedia research, TNS Gallup Oy 2002

Age structure of readership

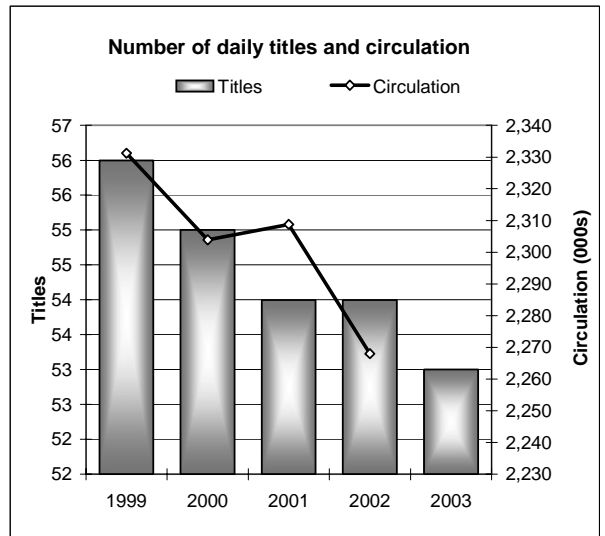
Age	% of readership	% dailiy reach within age group
15-24	14	72
25-44	38	86
45-59	31	94
60+	14	97

Source: Intermedia research, TNS Gallup Oy 2002



NUMBER OF TITLES AND CIRCULATION

	1999	2000	2001	2002	2003	Change (%) 99/2003	2002/03
Number of titles							
All newspapers	207	199	200	200	199	-3.86	-0.50
Total dailies	56	55	54	54	53	-5.36	-1.85
National dailies	8	8	8	8	8	0.00	0.00
Regional dailies	48	47	46	46	45	-6.25	-2.17
Non-dailies	151	149	146	146	146	-3.31	0.00
National non-dailies	3	3	3	3	3	0.00	0.00
Local non-dailies	148	146	143	143	143	-3.38	0.00
Free papers	136	136	136	136	-	-	-
Circulation (000)						**	***
Circulation*	3,274	3,228	3,198	3,216	3181	-1.76	0.57
Total dailies	2,331	2,304	2,309	2,268	2,243	-2.71	-1.77
National dailies	980	968	972	940	924	-4.07	-3.32
Regional dailies	1,351	1,336	1,336	1,328	1,319	-1.73	-0.63
Non-dailies	942	924	889	948	937	0.59	6.63
National non-dailies	140	140	136	132	128	-5.80	-3.21
Local non-dailies	802	785	753	815	809	1.58	8.28
Total annual sales (millions of copies)							
Dailies	773	764	767	759	759	-1.81	0.00
Non-dailies	93	91	88	81	81	-12.90	0.00
Free papers	333	333	333	333	-	-	-



Source: Circulation statistics, Finnish newspaper association

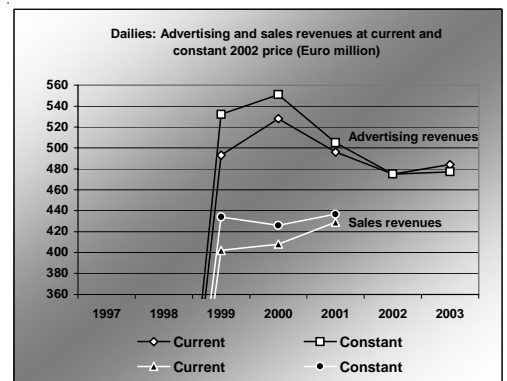
* Average circulation per issue

** = Change (%) 99/2002

*** = Change (%) 2002/03

MORE FACTS

	1999	2000	2001	2002	2003	Change (%) 99/2003	02/2003
Advertising revenues (Euro million)							
Dailies	493	528	496	475	484	-1.83	1.89
Dailies §	532	551	505	475	477	-10.31	0.49
Non-dailies	52	55	51	49	51	-2.18	4.08
Free papers	49	51	52	56	61	24.21	8.93
Online	6.2	11.8	11.0	15.0	17	173.18	13.33
Sales revenues (Euro million)						*	*
Total†	-	408	429	434	-	-	-
Total §	-	426	437	434	-	-	-
Dailies	402	408	429	-	-	6.72	5.14
Dailies §	434	426	437	-	-	0.65	2.58
Non-dailies	45	45	46	51	-	1.30	2.82
Non-dailies §	49	47	47	51	-	-4.47	0.31
Volume of advertising sold (column metres)							
Total	458,000	477,000	457,000	446,000	440,000	-3.93	-1.35
In colour *	315,000	343,000	345,000	350,000	405,000	28.57	15.71



Source: Suomen Lehdistö - Finland's Press issue 6/2003; Mainonnan määrä Suomessa 2003, TNS Gallup

§ at constant 2002 prices Ad revenue includes classifieds and inserts

† Including VAT

* % change shows 99/2001 and 2000/01

Contribution of classified and display advertising to total advertising income (%)

	1997	1998	1999	2000	2001	2002	2003
Display	75.8	76.4	76.2	74.5	75.5	76.9	77.9
Classified	24.2	23.6	23.8	25.5	24.5	23.1	22.1

Source: Mediamainonnan määrä nettohinnoin 2003, TNS Gallup

Distribution and newsprint costs

	1997	1998	1999	2000	2001	2002	2003
Newsprint costs (average per ton)							
Euros	505	521	521	555	550	525	500

Source: Sanomalehtien Liitto estimates

On-line readership (no. of visitors per week)

Newspaper	Feb 1998	Feb 1999	Feb 2000	Feb 2001	Feb 2002	Dec 2003
Ilta-Sanomat	-	-	78,500	117,900	217,503	987,800
Helsingin Sanomat	5,800	8,500	75,600	129,300	212,880	791,249
Iltalehti	25,000	48,000	156,800	125,700	193,949	864,431
Kaupparehti	5,000	9,500	74,200	72,900	75,169	190,261
Aamulehti	-	-	-	14,300	17,963	113,406

Source: www.gallupweb.com RedSheriff, visitors per month

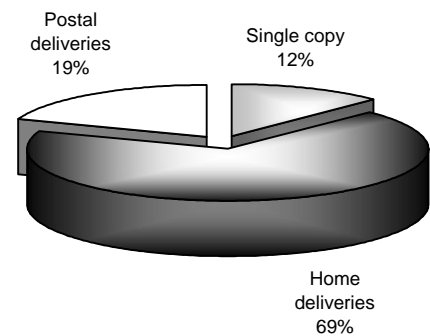
Cover prices

	Euro
Single copy	0.67 - 2.00
Subscription *	0.48 - 0.84

* Price divided by number of issues in a subscription period


Type of daily newspaper sales (%)

	Single copy	Home deliveries	Postal deliveries
1999	13	74	13
2000	13	73	14
2001	13	73	14
2002	12.4	68.2	19.4

Type of newspaper sales in 2002 (%)

Top dailies (2003)

Title	Publisher	Circulation (000)	Readership (000)	Cover Price		Format	Full page rate (Euro)	
				Euro	US\$		Mono	Colour
Helsingin Sanomat	Sanoma Osakeyhtiö	429	1,110	204.00 ¹	191.91	Broadsheet	15,685	21,149
Ilta-Sanomat	Sanoma Osakeyhtiö	205	915	1.00 ²	0.94	Tabloid	6,200	6,200
Aamulehti	Kustannus Oy Aamulehti	135	329	202.00 ¹	190.03	Broadsheet	10,962	10,962
Iltalehti	Kustannus Oy Iltalehti	126	663	1.00 ²	0.94	Tabloid	4,172	5,356
Turun Sanomat	TS-Yhtymä Oy	110	282	196.00 ¹	184.38	Broadsheet	12,642	16,716
Maaseudun Tulevaisuus	Viestilehdet Oy	84	295	109.00 ¹	102.54	Broadsheet	11,232	15,184
Kaupparehti	Kustannus Oy Kaupparehti	83	277	215.00 ¹	202.26	Tabloid	14,900	14,900
Kaleva	Kaleva Kustannus Oy	82	221	195.00 ¹	183.44	Broadsheet	11,830	13,356
Keskisuomalainen	Keskisuomalainen Oyj	76	188	195.00 ¹	183.44	Broadsheet	8,976	11,424
Savon Sanomat	Savon Mediat Oy	65	179	200.00 ¹	188.15	Broadsheet	5,595	5,595

¹ One year subscription price ² Single copy price

Employment & salary

	1997	1998	1999	2000	2001	2002	2003
Total no. of Journalists	2,970	2,817	3,066	3,324	3,128	-	2,150
Total no. of Employees	8,709	10,026	10,382	10,849	9,300	9,400	9,600
Total salary costs							
<i>Euro (Mill)</i>	242	290	297	313	285	295	303

Top ten advertising categories (2003)

Advertising sector	% of display ad revenue
Motor vehicles	25,6
Travel	11,5
Telecommunications	10,0
Education	4,7
Furniture	3,9
Other services	3,2
Office equipment	3,2
Media	3,0
Clothing	2,9
Groceries	2,8

Top ten publishing companies (2003)

(ranked by total circulation)
Sanoma Osakeyhtiö
Alpress Oy
TS-Yhtymä Oy
Ilkka Yhtymä Oy
Savon Mediat Oy
Keskisuomalainen Oyj
Esan Kirjapaino Oy
Hufvudstadsbladet Ab
Pohjois-Karjalan Kirjapaino Oy
Länsi-Savo Oy

Top ten advertisers (2003)

Advertiser
K-Citymarket
Prisma
Lidl
K-Supermarket
S-Market
K-Rauta
Teliasonera
Sokos
Euromarket
Huoneistokeskus

Source: TNS Gallup Oy Adex

Internet publishing (no. of on-line editions)

	1997	1998	1999	2000	2001	2002	2003
Dailies	37	40	42	47	47	49	49
Non-dailies	-	15	31	33	42	56	66

Source: Finnish newspaper associaton

Daily newspaper colour capability & formats

	1999	2000	2001	2002
4-colour newspapers	56	55	54	54
Broadsheets	35	33	37	-
Tabloids	13	15	11	-
Other	8	7	6	-

Media consumption (minutes per day)

	1996	1997	1998	1999	2000	2001	2002
Newspapers	40	-	42	-	38	-	48
Magazines	39	-	49	-	42	-	25
Radio	-	-	136	-	142	-	185
Television	163	-	192	-	142	-	215
Internet	-	-	-	-	14	-	21

Source: Intermedia research, TNS Gallup 2002



ADVERTISING EXPENDITURE & ECONOMIC DATA

Main economic indicators 1996-2002

	1996	1997	1998	1999	2000	2001	2002
1 US\$=	1.06	Euro at 2002 rate					
Gross Domestic Product (Euro billion)							
at current prices	99	107	116	120	130	136	140
% change	3.8	8.5	8.1	3.9	8.6	4.3	2.9
at 2002 prices	106	113	121	124	130	132	134
% change	3.2	7.2	6.6	2.7	4.9	1.7	1.1
Gross Domestic Product per capita (Euro 000)							
at current prices	19.2	20.8	22.4	23.2	25.1	26.2	26.9
at 2002 prices	20.7	22.1	23.5	24.0	25.1	25.5	25.8
Population							
Millions	5.1	5.1	5.2	5.2	5.2	5.2	5.2
Consumer Price Index							
2002=100	89.3	90.3	91.6	92.6	95.8	98.2	100.0
% change	0.6	1.2	1.4	1.2	3.4	2.5	1.8
Ad.spend as a % of GDP							
	0.80	0.82	0.84	0.86	0.85	0.79	0.75
Advertising Expenditure Growth (%)							
at current prices	3.0	10.5	11.0	6.0	7.3	-3.3	-1.5
at 2002 prices	2.4	9.2	9.5	4.8	3.7	-5.7	-5.7

Source: IFS, ZenithOptimedia

Advertising expenditure

(Euro millions, in current prices)

	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
Newspapers	462	491	540	582	624	599	580	595	599	602	601
Magazines	111	133	158	170	183	184	179	179	181	182	182
Television	165	190	204	205	213	195	201				
Radio	27	30	34	34	38	40	44				
Cinema	1	1	2	2	2	2	2				
Outdoor	25	29	31	32	35	34	32				
Total	792	876	972	1,031	1,106	1,069	1,053	1,079	1,092	1,099	1,100

Source: 1996-2000 Gallup Mainostieto, 2001-2006 ZenithOptimedia

Notes: Excludes agency commission and production costs, includes classified advertising, after discounts

Research

Circulation is audited by: Levikintarkastus Oy

Readership is measured by: TNS Gallup Oy

Methodology: 26 000 telephone interviews

Is there any law prohibiting or restricting foreign companies or individuals from owning shares, and in particular, the majority of shares, of domestic daily newspapers? No

Taxes

VAT on: sales 22 (standard VAT rate 22%)

Is there any law prohibiting daily newspaper or periodical publishers from operating radio or television stations in the same locality? No

Subsidies

Are there subsidies for the purchase of newsprint? No

Are loans granted at low rates for re-equipment or improving existing equipment? No

So as to guarantee disclosure and transparency in the capital structure and to avoid silent partners, is there any law or rule permitting in any event the possibility of finding out who are the actual owners of a publishing company? No

Are there any direct subsidies? No

Is there an antitrust law limiting concentration in the daily press? No

Ownership

Does any law exist governing publishing-house ownership, or the registration of shares in newspaper-publishing companies? No

Is further regulation of media concentration expected? No

POPULATION

Adult population by age and sex

	All adults		Male		Female	
	000	%	000	%	000	%
16-24	7,544	16	3,827	17	3,717	15
25-34	7,817	16	3,893	17	3,924	16
35-44	8,942	19	4,469	19	4,473	18
45-54	7,457	16	3,595	16	3,862	15
55-64	6,585	14	3,221	14	3,364	13
65+	9,719	20	4,077	18	5,642	23
Total	48,064	100	23,082	100	24,982	100

Source: EUROPQN/SPQR 2003

Population by social class and sex

	All adults		Male		Female	
	000	%	000	%	000	%
AB	10,623	22	6,454	28	4,169	17
C	14,867	31	7,501	32	7,366	29
D	642	1	393	2	249	1
E	21,931	46	8,733	38	13,198	53
Total	48,063	100	23,081	100	24,982	100

Source: EUROPQN/SPQR 2003

AB = executives, professionals, administrators

C1 = employees, clerks

C2 = skilled manual workers

D = farmers

E = inactive

Housewives (co-habiting persons)

	Housewives 000
under 25	2,970
25-34	801
35-44	804
45-54	851
55-64	2,160
65+	5,611
Total	13,197

Source: EUROPQN/SPQR 2003

Households

Occupancy	Adults 000
1 person	7,830
2 people	15,790
3 people	9,396
4 people	9,118
5 or more people	5,930
without children	24,057
with children	24,007
Total	48,064

Source: EUROPQN/SPQR 2003

Age structure of readership

Age	% of readership	% reach within age group
16-24	12.6	36.3
25-34	13.2	36.6
35-44	16.9	41.0
45-59	16.2	47.1
60-65	16.4	54.2
65+	24.8	55.5

Source: EUROPQN/SPQR 2003

Newspaper reach (%)

	Daily
All adults	45.3
Men	49.3
Women	41.5
MHS	43.9

MHS = Main Household Shopper

Source: EUROPQN/SPQR 2003

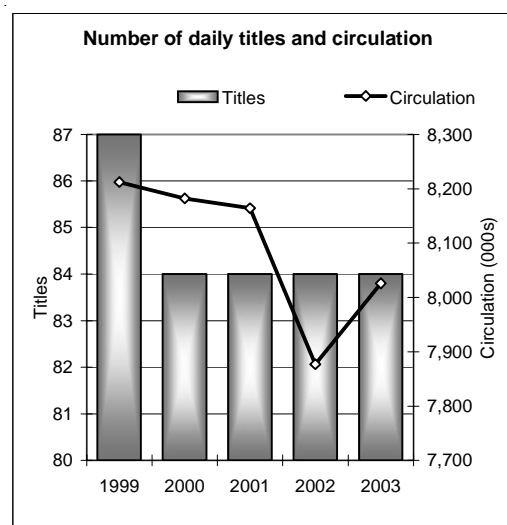
NUMBER OF TITLES AND CIRCULATION

	1999	2000	2001	2002	2003	Change (%)	
						99/2003	2002/03
Number of titles							
Total dailies	87	84	84	84	84	-3.45	0.00
National dailies	23	23	23	23	23	0.00	0.00
Regional dailies	64	61	61	61	61	-4.69	0.00
Regional non-dailies	245	-	-	-	-	-	-
Sundays	32	-	-	-	29	-	-
Free papers	390	-	-	-	-	-	-
Circulation (000)							
Total dailies	8,212	8,182	8,164	7,877	8,026	-2.26	1.89
National dailies *	2,106	2,110	2,091	1,995	2,189	3.94	9.72
Regional dailies **	6,106	6,072	6,073	5,882	5,837	-4.41	-0.77
Regional non-dailies	2,236	-	-	-	-	-	-
Sundays	297	280	301	295	290	-2.36	-1.69
Free papers	34,839	-	-	-	-	-	-
Total annual sales (millions of copies)							
Total dailies	2,555	2,572	2,562	2,487	2,436	-4.66	-2.05
National dailies	709	717	714	685	664	-6.35	-3.07
Regional dailies	1,846	1,855	1,848	1,802	1,772	-4.01	-1.66

Source: SPP/SPQR/DDM/OJD

* figures are for 12 titles, which represented 95% of total national circulation in 2001

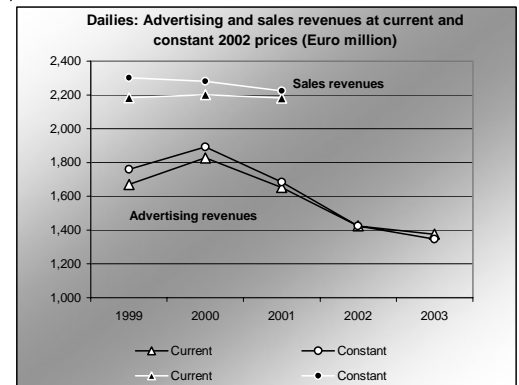
** figures are for 59 titles, which represented 99% of total regional circulation in 2002





MORE FACTS

	1999	2000	2001	2002	2003	Change (%)	
						99/2003	2002/03
Advertising revenues (Euro million)							
Dailies	1,670	1,828	1,651	1,426	1,374	-17.72	-3.65
National dailies	614	711	560	418	373	-39.24	-10.77
Regional & local dailies	1,056	1,117	1,091	1,008	1,001	-5.21	-0.69
Dailies §	1,759	1,893	1,683	1,426	1,344	-23.59	-5.72
Non-dailies	115	120	-	-	-	-	-
Sundays	95	103	-	-	-	-	-
Free papers	641	663	-	892	920	43.48	3.14
Sales revenues (Euro million)							
Dailies	2,185	2,202	2,182	-	-	-0.14	-0.91
National dailies	651	655	664	-	-	2.00	1.37
Regional & local dailies	1,534	1,547	1,518	-	-	-1.04	-1.87
Dailies §	2,302	2,281	2,224	-	-	-3.37	-2.47
Volume of advertising sold (total number of pages)							
Total	99,159	98,820	85,477	77,457	-	-21.89	-9.38
In colour	37,068	41,751	37,092	38,573	-	4.06	3.99



§ at constant 2002 prices

Source: SPP/SPQR/DDM/Secodip

* % change 99/2001 and 2000/2001

** % change 99/2002 and 2001/2002

Contribution of classified and display advertising to total advertising income (%)

	1999	2000
Display	73.5	72.6
Classified	26.5	27.4

Source: SPP/DDM

Newsprint costs

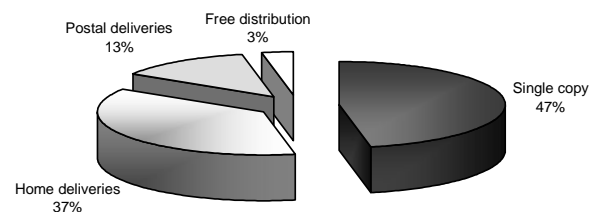
	1998	1999	2000	2001	2002
Newsprint costs (average per ton)					
Euro	556	549	541	648	570

Source: SPP

Type of newspaper sales in regional press (%)

	Single copy	Home deliveries	Postal deliveries	Free distribution
1999	45.3	37.5	14.2	3.0
2000	45.7	37.6	13.7	3.0
2001	45.5	38.0	13.5	3.0
2002	46.2	37.5	13.3	3.0
2003	47	37	13	3

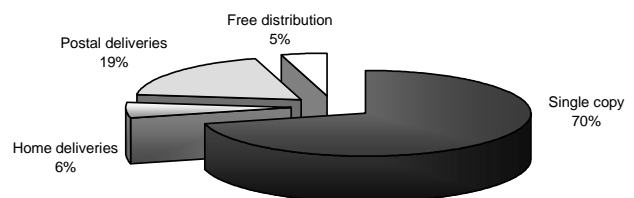
Type of newspaper sales in regional press 2003 (%)



Type of newspaper sales in national press (%)

	Single copy	Home deliveries	Postal deliveries	Free distribution
1999	73.3	4.3	19.1	3.4
2000	71.8	4.9	19.6	3.7
2001	71.7	5.2	19.6	3.5
2002	70.6	5.4	20.6	3.4
2003	71.0	6.0	18.5	4.5

Type of newspaper sales in national press 2003 (%)



Source: SPP/SPQR

Top ten dailies (2003)

Title	Circulation (000)	Readership (000)	Format
Ouest France	783	2,243	Berlinois
Le Monde	399	2,129	Berlinois
Le Parisien	362	1,724	Tabloid
Le Figaro	359	1,302	Broadsheet
L'Equipe	340	2,340	Broadsheet
Sud Ouest	326	-	Tabloid
La Voix du Nord	315	1,129	Broadsheet
Nice Matin	267	-	Broadsheet
Le Progrès	260	844	Broadsheet
Le Dauphiné Libéré	259	-	Broadsheet

Source: OJD

Top advertising categories (2003)

Advertising sector	% of display ad revenue
Services	41
Retail	32
Distribution	15
Business-to-business	13

Source: France Pub 2003/2004

**Top ten advertisers (2002)**

Advertiser	Newspaper expenditure Euro (000)
Lidl	50,993
Renault	44,637
France Telecom (inc. Orange)	38,947
Carrefour	36,712
Citroen	35,857
Peugeot	33,643
E. Leclerc	27,623
CEP	24,850
Credit Agricole	21,682
Ford	20,447

Source: Secodip

Employment & salary (regional press)

	1998	1999	2000	2001	2002
Total no. of journalists	4,296	4,874	-	5,444	5,135
Total no. of employees*	15,234	-	-	18,819	17,690
Total salary costs [^]					
	Euro (Mill)				
	550	595	-	-	-

Source: SPQR

[^]Salary costs are gross, excluding expenses

*Employees includes all full-time workers except journalists

Internet publishing (No. of online editions)

	2000	2001	2002	2003
Dailies	30	39	40	41
National dailies	-	-	-	11
Regional & local dailies	-	-	-	30

Source: SPQR, SPP

Regional newspaper colour capability & formats

Number of:	1999	2000	2001	2002	2003
4-colour newspapers	33	-	61	61	61
Broadsheets	24	-	42	35	33
Tabloids	5	-	11	18	19
Other	4	-	8	8	9

Source: SPQR

Media consumption (minutes per day)

	1999	2000	2001	2002	2003
National newspapers	31.5	31.0	31.0	31.5	31.0
Regional and local newspapers	-	-	24.2	24.1	24.0

Source: EUROPQN/SPQR 2003

Cover prices

National press	Euro
Single copy	0.75-1.20
Regional press	Euro
Single copy	0.70-0.85

ADVERTISING EXPENDITURE & ECONOMIC DATA**Main economic indicators 1996-2002**

	1996	1997	1998	1999	2000	2001	2002
1 US\$= 1.06 Euro at 2002 rate							
Gross Domestic Product (Euro billion)							
at current prices	1,213	1,251	1,301	1,355	1,417	1,464	1,506
% change	2.5	3.2	4.0	4.1	4.6	3.3	2.9
at 2002 prices	1,309	1,334	1,378	1,428	1,468	1,492	1,506
% change	0.5	1.9	3.3	3.6	2.8	1.7	0.9
Gross Domestic Product per capita (Euro 000)							
at current prices	20.8	21.3	22.1	22.9	24.1	24.7	25.4
at 2002 prices	22.4	22.8	23.4	24.2	24.9	25.2	25.4
Population							
Millions	58.4	58.6	58.9	59.1	58.9	59.2	59.2
Consumer Price Index							
2002=100	92.6	93.8	94.4	94.9	96.5	98.1	100.0
% change	2.0	1.2	0.7	0.5	1.7	1.6	1.9
Ad.spend as a % of GDP	0.62	0.62	0.64	0.68	0.72	0.67	0.63
Advertising Expenditure Growth (%)							
at current prices	2.7	3.8	8.2	10.3	10.9	-5.1	-1.9
at 2002 prices	0.7	2.5	7.4	9.7	9.0	-6.6	-3.8

Source: IFS, ZenithOptimedia

Advertising expenditure

(Euro million, in current prices)

	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
Newspapers	1,936	1,176	1,385	1,627	1,807	1,656	1,583	1,496	1,508	1,532	1,563
Magazines	1,814	2,702	2,861	3,064	3,297	3,243	3,073	3,073	3,125	3,200	3,296
Television	2,199	2,315	2,473	2,684	3,046	2,866	2,921				
Radio	564	543	575	645	715	655	713				
Cinema	46	47	52	68	81	72	74				
Outdoor	915	967	1,026	1,089	1,173	1,128	1,085				
Internet	0	5	17	79	144	115	99				
Total	7,474	7,755	8,390	9,256	10,264	9,735	9,548	9,541	9,793	10,092	10,439

Source: 1996-2002 IREP, 2003-2006 ZenithOptimedia

Notes: Includes 15% agency commission and classified advertising, excludes production costs and taxes. Newspapers include national, regional and free titles, TV includes cable & satellite from 1997. After discounts.



Research

Circulation is audited by: Diffusion Contrôle/OJD, a collaboration of newspapers, agencies and advertisers.

Readership is measured by: The newspaper associations EUROPQN (national newspapers), SPQR (regional dailies) and SPHR (regional weeklies) have contracted IPSOS Médias to measure newspaper readership.

Methodology: The continuous survey comprises 22,800 computer-assisted telephone interviews seven days a week between 6.00pm and 9.00pm. Respondents are all adults (15+).

Taxes

VAT on: sales 2.1% advertising 19.6%
 newsprint 19.6% plant 19.6%
 composition 5.5% (standard VAT rate 19.6%)

Corporation tax is 33.3% for all companies.

There is a special fund system for investment (Section 39bis, General Tax Code).

Passed in 1945, Section 39bis of the General Tax Code provides a system that, by exempting from taxation funds set aside for investment, makes it easier for newspapers to purchase equipment and facilities. The following are exempt under this system:

- Funds set aside during the financial year for investment in equipment or facilities that are strictly necessary for the operation of the newspaper.
- Funds set aside as a reserve for subsequent investment of the same kind.

Newspaper companies may also set aside a reserve fund exempt from taxation within the following limits:

- 30% of the profits from non-daily publications.
- 80% of the profits from all dailies and regional weeklies with a turnover less than Euro 84 million.

The reserve fund can only be used to finance part of the cost of the equipment and facilities within the following limits:

- 40% of the average production cost of a non-daily newspaper
- 90% of the average production cost of all dailies and regional weeklies.

Since 1986, newspaper companies have been able to use the fund to develop electronic information services to operate in conjunction with their publications. Since 1997 the fund has been used to (a) acquire land and majority stakes in printing companies that use distribution networks, (b) compile databases from information generated by the newspaper or publication and (c) buy materials needed to exploit such data. The Finance Law for 2002 postponed the expiration of Article 39bis to 2006.

Subsidies

In 2002 the finance ministry introduced a new subsidy to help pay for the distribution of national daily newspapers providing political and general information.

In 1998 two new funds made loans available to publishers under certain conditions:

1. The Multimedia Press Fund – The government has created a fund to help the French print media modernise and adapt to new information technologies. This fund shall advance money to print media companies, part of which must be repaid. 40% of this advance may be rebated when the publisher is able to prove a given project has been completed.
2. The Modernisation Fund for daily newspapers – This fund is financed by the proceeds of a 1% tax levied on advertisers investing in the free and commercial printed media (free and promotional papers, brochures, catalogues, direct mailing and so on). The objective of this aid is to finance modernisation projects presented by publishers, treated on a case-by-case basis. To be eligible for this (direct) subsidy, projects have to be innovative, outside of daily management, have positive effects on employment and the financial health of the company.

Discounts

on: post and other transport 50% * rail 70%
 telephone 0 telegraph 0 fax 50%**

* Global 50% rebate on the total transportation cost. ** Only applicable to daily newspapers.

Ownership

Does any law exist governing publishing-house ownership, or the registration of shares in newspaper-publishing companies? Yes. No silent partners are allowed. Shares in publishing companies must be registered. The holder of the majority of shares is considered the publisher.

Is there any law prohibiting or restricting foreign companies or individuals from owning shares, and in particular, the majority of shares, of domestic daily newspapers? Yes. Foreign companies and individuals may own no more than 20% of the capital in a company that publishes a newspaper. No individual shareholder can hold more than 49% of the capital or voting rights.

Is there any law prohibiting daily newspaper or periodical publishers from operating radio or television stations in the same locality? Yes. There is a general principle that ownership is restricted to 'any two of four' within the following groups:

National

- Terrestrial/digital terrestrial TV available to four million people or more
- Cable radio/TV available to 6 million people or more
- Terrestrial radio available to 30 million people or more
- 20% of national newspaper circulation

Regional/local

- Regional/local terrestrial TV

	1999	2000	2001	2002	2003
Euro million	62.5	64.6	63.4	67.2	63.6



- Terrestrial radio available to max 10% of the regional/local population
- Regional/local TV and radio
- Regional/local newspapers

An amendment has been made to the media concentration law of September 30 1986 whereby no individual shareholder can hold more than 49% of the capital or voting rights, either directly or indirectly, of a TV station broadcasting on terrestrial if that company's average annual audience share across all platforms is greater than 2.5%.

A further amendment states that no individual or legal entity holding an analogue radio licence may reach more than 150 million listeners, either through its own transmissions, or through the programming it supplies to other licence-holders, or through any combination of these.

So as to guarantee disclosure and transparency in the capital structure and to avert silent partnerships, is there a law or rule making it possible to determine who actually owns a publishing company? Yes. The law of August 1 1986 prohibits the lending

of one's name to any publishing company by falsely applying for shares, another instrument or the purchase of a company.

The shares of any joint venture must be registered, and any transfer must receive the prior approval of the company's board of administrators or supervisory board. Moreover, every newspaper issue must contain the names of the owners if the company is not a legal entity, or the designation, registration office, form and name of the legal representative if the company is a legal entity.

Is there an antitrust law limiting concentration in the daily press? Yes. The law of November 30 1986 prohibits the acquisition, takeover or management of a general or political-interest daily by any individual or legal entity, or by any group of people, when such an action would permit control or ownership, directly or indirectly, of the publication if its total circulation is greater than 30% of the national circulation of the dailies in the same category.

Are there plans to pass legislation regulating media concentration? No

GABON

POPULATION & MORE FACTS

Population by age and sex

	All individuals		Male		Female	
	000	%	000	%	000	%
0-14	411	33	206	33	205	33
15-64	747	61	376	61	371	60
65+	75	6	37	6	38	6
Total	1,233	100	619	100	614	100

Source: CIA

Top dailies (2001)

Title	Circulation		Full page rate (€)	
	701	876	Colour	
L'Union	22	1,121		2,744

Source: HMI

ADVERTISING EXPENDITURE & ECONOMIC DATA

Main economic indicators 1996-2002

	1996	1997	1998	1999	2000	2001	2002
1 US\$= 696.99 CFA Franc at 2002 rate							
Gross Domestic Product (CFA Franc billion)							
at current prices	2,913	3,109	2,645	2,840	3,611	-	-
% change	17.7	6.7	-14.9	7.4	27.1	-	-
at 2000 prices	3,028	3,109	2,595	2,853	3,611	-	-
% change	16.9	2.7	-16.5	9.9	26.5	-	-
Gross Domestic Product per capita (CFA Franc)							
at current prices	2,624	2,727	2,300	2,406	2,984	-	-
at 2000 prices	2,728	2,727	2,257	2,418	2,984	-	-
Population							
Millions	1.1	1.1	1.2	1.2	1.2	1.2	1.2
Consumer Price Index							
2000=100	96.2	100.0	101.9	99.5	100.0	-	-
%change	0.7	4.0	1.9	-2.3	0.5	-	-

Source: IFS, ZenithOptimedia

GAMBIA, THE

General economic situation

GDP total US\$2.582 billion; GDP per capita US\$1,720 (purchasing power parity; 2002). Consumer price index 105.5 (2002).

Performance of newspapers vs. other media

The government operates the only national television station. One government controlled and four private radio stations broadcast during the year. Occasionally there were public affairs broadcasts on at least two independent radio stations. Local stations sometimes rebroadcast the British Broadcasting Corporation (BBC), Radio France Internationale, and other foreign news reports, and all were available via shortwave radio. Senegalese television and radio were available in many parts of the country. Wealthy residents also used television satellite systems to receive independent news coverage.

Performance of different types of newspapers

The government published a daily newspaper, the Gambia Daily. The Daily Observer, though independent, favours

government in its coverage. There are four other independent newspapers, including one published by an opposition political party.

Media/press laws

Decrees 70 and 71 require all newspapers to post a US\$4,500 (100,000 dalasi) bond or cease publication. The bond was required to ensure payment of any penalties imposed by a court for the publication of blasphemous or seditious articles or other libel. State-owned publications were not subject to these decrees.

The National Media Commission Bill, adopted in 2002, gives government authorities the power to license journalists, to deny the right to confidentiality of sources, to formulate a journalistic code of ethics, and to punish the media for non-compliance.

Sources: CIA - The World Factbook 2003; US State Department; Freedom House; BBC

POPULATION & MORE FACTS

Population by age and sex

	All individuals		Male		Female	
	000	%	000	%	000	%
0-14	674	45	338	45	336	45
15-64	787	52	390	52	397	53
65+	40	3	21	3	19	3
Total	1,501	100	749	100	752	100

Source: CIA - The World Factbook 2003

Top dailies (2003)

	2002	Title
Number of titles		Daily Observer
National dailies	2	Gambia Daily

Source: WAN from public sources

Source: WAN from public sources

GEORGIA

General economic situation

GDP total US\$16.05 billion; GDP per capita US\$3,252 (purchasing power parity; 2002). Consumer price index 105.2 (2002).

Performance of newspapers vs. other media

In 2000, representatives of Russian financial capital actively began acquiring Georgian media holdings, as well as establishing new ones. Three new periodicals and two TV channels were established in such a way within a two-year period.

Most persons received their news from television and radio. The government financed and controlled the main radio and television network with a national audience. In addition to Rustavi-2, there were seven independent television stations in Tbilisi. An international NGO estimated that there were more than 45 regional television stations, 17 of which offered daily news. While these stations ostensibly were independent, a lack of advertising revenue often forced them to depend on local government officials for support.

Performance of different types of newspapers

There were approximately 200 independent newspapers in circulation. Few newspapers were editorially independent and commercially viable. Typically newspapers were subsidized by and subject to the influence of their patrons in politics and business. The government financed and controlled one newspaper which was published in Russian, Azeri-, and Armenian-language versions; the newspaper

reflected official viewpoints. Several newspapers were reputable sources of information, although lack of financial resources hindered overall journalistic development and standards.

Newspaper launches/closures

In 2003, the monthly newspaper Panorama was launched as a joint initiative of the British NGOs. Published in Georgian and Russian, it is focused on the Caucasus issues, especially the Georgian-Abkhaz conflict divide.

Circulation

Media experts in Georgia estimate that 30 to 35 copies of newspapers are sold per 1,000 people. The highest-circulation independent daily newspaper, Alia, had a national circulation nearly 20 percent higher than the government-controlled daily; however, independent newspapers continued to struggle in the regions, due largely to the population's poverty. High printing costs, a lack of advertising, and general poverty limited the circulation of many newspapers.

Media/press laws

The Administrative Code contains a freedom of information section that provides for public access to government meetings and documents; however, few journalists employed it. The adoption of a freedom of information act and judicial enforcement of this law made agencies more willing to provide information. Libel laws inhibited investigative journalism. The Civil Code and



other legislation make it a crime to insult the honour and dignity of an individual and place the burden of proof on the accused.

Source: CIA – The World Factbook 2003; US State Department; Independent Association of Georgian Journalists; CASCEN; International Centre for Journalists – Caucasus

POPULATION & MORE FACTS

Population by age and sex

	All individuals		Male		Female	
	000	%	000	%	000	%
0-14	916	19	467	20	449	17
15-64	3,374	68	1,629	69	1,745	67
65+	645	13	252	11	393	15
Total	4,935	100	2,348	100	2,587	100

Source: CIA - The World Factbook 2003

	1999	2000	Change (%) 1999/2000
Number of titles			
Total dailies	30	35	16.67
Non-dailies	122	-	-
Circulation (000)			
Total dailies	43	26	-39.53

Source: UNESCO

Top dailies (2003)

Title
Alia
Tribuna
Resonance
Khvalindeli Dge (Tomorrow)
24 Saati (24 Hours)
Akhali Taoba (New Generation)

Source: WAN from public sources

GERMANY

POPULATION

Population

	All individuals		Households 000
	000	%	
under 6	4,624	6	38,720
6-15	7,791	9	
15-25	9,515	12	
25-45	24,764	30	
45-65	21,404	26	
65+	14,439	17	
Total	82,537	100	

Source: Statistisches Bundesamt 2002

Population by social class and sex

	All adults		Male		Female	
	000	%	000	%	000	%
1 (high)	6,480	10	4,000	13	2,480	7
2	8,030	13	3,900	13	4,130	12
3	10,300	16	4,550	15	5,750	17
4	15,180	24	6,910	23	8,270	25
5	10,190	16	4,960	16	5,230	16
6	7,210	11	3,370	11	3,840	11
7 (low)	6,840	11	2,980	10	3,860	12
Total	64,230	100	30,670	100	33,560	100

Source: AWA 2001

Households

Occupancy	Households 000
1 person	14,225
2 people	13,060
3 people	5,487
4 people	4,315
5 or more people	1,633
Total	38,720

Source: Statistisches Bundesamt 2002

Newspaper reach (%)

	Daily
All adults	76.2
Men	77.7
Women	74.8

Source: MA 2003 Tageszeitungen

Age structure of readership

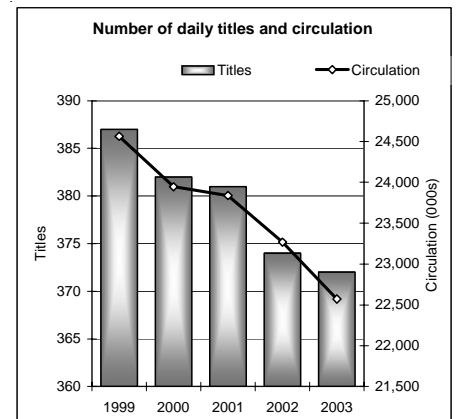
Age	% reach within the age group
14-19	53.6
20-29	63.2
30-39	72.2
40-49	79.7
50-59	83.8
60-69	84.8
70+	82.7

Source: MA 2003 Tageszeitungen

NUMBER OF TITLES AND CIRCULATION

	1999	2000	2001	2002	2003	Change (%)	
						98/2002	2001/02
Number of titles							
Total dailies	387	382	381	374	372	-3.88	-0.53
National dailies	9	9	10	10	10	11.11	0.00
Regional & local dailies	378	373	371	364	362	-4.23	-0.55
Total non-dailies	1,335	1,336	1,360	1,335	1,317	-1.35	-1.35
National non-dailies	10	9	9	8	6	-40.00	-25.00
Regional & local non-dailies	14	16	15	15	19	35.71	26.67
Free non-dailies	1,311	1,311	1,336	1,312	1,292	-1.45	-1.52
Sundays	7	7	7	7	17	142.86	142.86
National Sundays	-	-	-	-	7	-	-
Regional & local Sundays	-	-	-	-	10	-	-
Circulation (000)							
Total dailies	24,565	23,946	23,838	23,267	22,571	-8.12	-2.99
National dailies	1,644	1,653	1,732	1,691	1,653	0.55	-2.25
Regional & local dailies	22,921	22,293	22,106	21,576	20,918	-8.74	-3.05
Total non-dailies	90,568	90,561	92,666	90,813	88,676	-2.09	-2.35
National, regional & local non-dailies	2,028	2,021	1,913	1,913	1,876	-7.50	-1.93
Free dailies	88,540	88,540	90,753	88,900	86,800	-1.97	-2.36
Sundays	4,475	4,485	4,481	4,485	4,315	-3.58	-3.79

Source: IVW/ZMG II



MORE FACTS

	1999	2000	2001	2002	2003	Change (%)	
						99/2003	2002/03
Advertising revenues (Euro million) **							
Dailies	6,066	6,557	5,642	4,937	5,075	* -16.34	2.80
Dailies §	6,419	6,802	5,714	4,937	5,020	* -21.80	1.68
Non-dailies & Sundays	261	278	287	268	-	-	-
Sales revenues (Euro million) ***							
Dailies	3,522	3,507	3,681	3,800	3,893	10.53	2.45
Dailies §	3,727	3,639	3,728	3,800	3,851	3.32	1.33
Non-dailies & Sundays	182	184	185	226	255	40.11	12.83
Volume of advertising sold (pages & page equivalents)							
Total	651,791	694,458	645,783	587,193	551,714	-15.35	-6.04

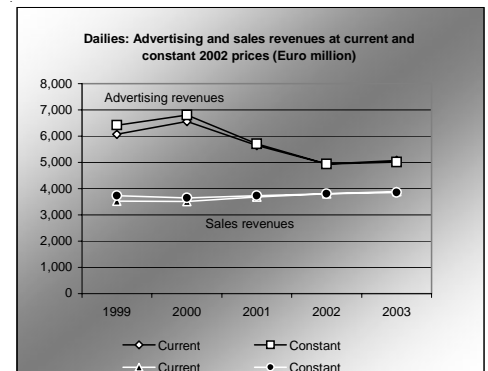
Source: BDZV, ZMG

§ at constant 2002 prices

* WAN/ZenithOptimedia estimate

** These figures include classifieds and inserts

*** These figures do not include VAT

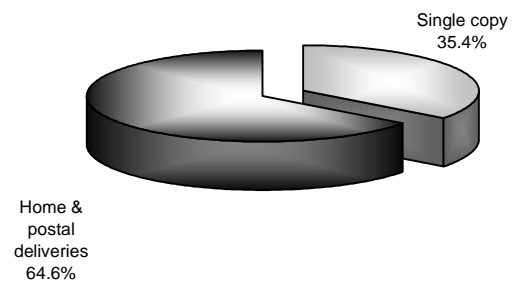




Type of newspaper sales (%)

	Single copy	Home & postal deliveries	Bulk deliveries
1999	30.1	68.3	1.6
2000	31.4	68.6	-
2001	32.9	67.1	-
2002	36.4	63.6	-
2003	35.4	64.6	-

Type of newspaper sales in 2003 (%)



Top ten dailies (2003)

Title	Publisher	Circulation (000)*	Readership (000)**	Cover Price		Format	Full page rate (Euro)	
				Euro	US\$		Mono	Colour
Bild	Axel-Springer	3,989	12,334	0.45	0.42	Nordisch	258,387	303,535
WAZ Mediengruppe ¹	Zeitungsgruppe WAZ	1,029	2,833	0.80	0.75	Rheinisch	114,258	154,255
Zeitungsgruppe Köln Gesamt ²	M.Dumont-Schauberg	644	1,120	0.85	0.80	Berliner	21,466	30,702
Süddeutsche Zeitung	Süddeutsche Zeitung	433	1,104	1.40	1.32	Nordisch	37,594	53,434
Zeitungsgruppe Thüringen ³	Zeitungsgruppe Thüringen	416	1,128	0.70	0.66	Rheinisch	47,947	65,688
Rheinische Post	Rheinisch-Bergische Druckerei und Verlagsgesellschaft	411	1,217	0.90	0.85	Rheinisch	38,640	57,960
Frankfurter Allgemeine Zeitung	Verlag Frankfurter Allgemeine Zeitung	381	860	1.50	1.41	Nordisch	33,792	52,378
fp Freie Presse mit Döbelner Anzeiger	Freie Presse Chemnitzer Verlag u. Druck	372	956	0.80	0.75	Rheinisch	44,678	62,543
Augsburger Allgemeine/ Allgäuer Zeitung	Presse- Druck- und Verlags	358	989	1.00	0.94	Rheinisch/Berliner	12,163	-
Nürnberger Nachrichten	Mitteldeutsches Druck- und Verlagshaus	315	876	1.00	0.94	Berliner	14,288	19,278

* Circulation source: IVW, Q2 2003

** Readership source: MA 2003 Tageszeitungen

¹ Westdeutsche Allgemeine Zeitung, Neue Ruhr Zeitung/Neue Rhein Zeitung, Westfalenpost, Westfälische Rundschau

² Kölner Stadtanzeiger/Kölner Rundschau

³ Thüringer Allgemeine, Thüringische Landeszeitung, Ostthüringer Zeitung

Top advertising categories (2003)

Sector	% ad revenue
Local businesses	46.0
Family	9.5
Property	8.8
National businesses	8.7
Motor vehicles	5.6
Classified	5.2
Events	3.4
Travel	2.2
Other	10.6

Source: ZMG

Top ten publishing companies (2003)

(ranked by total circulation)	Total circulation
Axel Springer	5,786,000
Verlagsgruppe WAZ	1,553,570
Verlagsgruppe Stuttgarter Zeitung/Die Rheinpfalz/Südwestpresse	1,197,500
Verlagsgruppe M. DuMont Schauberg	1,011,200
Georg von Holtzbrinck	1,010,000
Verlagsgruppe Münchener Zeitungsverlag/Zeitungsverlag tz München/ Westfälischer Anzeiger/Dirk Ippen	1,005,300
Gruner + Jahr	858,700
Verlagsgruppe Frankfurter Allgemeine Zeitung	682,500
Verlagsgruppe Süddeutscher Verlag	730,870
Verlagsgruppe Madsack	676,500

Source: Media Perspektiven

Top ten advertisers (2002)

Advertiser	Expenditure (Euro million)
Procter & Gamble	282.6
Media-Markt/Saturn	239.4
Ferrero	232.9
Axel Springer Verlag	221.8
Lidl & Schwarz	213.2
L'Oréal Haarkosmetik + Parfüm	200.2
Unilever Bestfoods	164.6
Opel	151.8
VW	146.9
Gruner+Jahr Verlag	145.2

Source: ZAW

Internet publishing (No. of online editions)

	1999	2000	2001	2002	2003
Dailies	179	249	256	259	264
Non-dailies	4	-	-	-	-

Online readership page impressions in December (million)

Newspaper	2003	
BILD	www.Bild-t-online.de	225.1
Süddeutsche Zeitung	www.sueddeutsche.de	31.5
FAZ	www.faz.net	19.6
Rheinische Post	www.rp-online.de	15.5
Die Welt	www.welt.de	14.8

Source: BDZV

The above figures are independently audited

Media consumption (minutes per day)

	1999	2000	2001	2002	2003
Newspapers	24	25	24	-	39
Magazines	15	15	15	-	10
Radio	143	158	169	-	206
Television	146	154	153	-	185
Internet	9	17	30	-	13

Source: Time-Budget/Sevenone Media/Forsa/ZMG/Media Perspektiven

Cover prices

	Euro
Single copy	0.71
Subscription *	21.34

* per month



CROSS MEDIA OWNERSHIP

Owners	Regional TV	National TV	Regional Newspapers	National Newspapers	Radio
Regional TV Licensees	Max. 30% market share in TV (either German or foreign)	Max. 30% market share in TV (either German or foreign)	Allowed	Allowed	Allowed
National TV Licensees	Max. 30% market share in TV (either German or foreign)	Max. 30% market share in TV (either German or foreign)	Allowed	Allowed	Allowed
Regional Newspaper Owners	Allowed	Allowed	Allowed	Allowed	Up to 25% or 35% ordinary capital
National Newspaper Owners	Allowed	Allowed	Allowed	Allowed	Up to 25% or 35% ordinary capital
Satellite TV Broadcasters	Max. 30% market share in TV (either German or foreign)	Max. 30% market share in TV (either German or foreign)	Allowed	Allowed	Allowed
Local Radio Licensees	Allowed	Allowed	Up to 25% or 35% ordinary capital	Up to 25% or 35% ordinary capital	Allowed
National Radio Licensees	Allowed	Allowed	Up to 25% or 35% ordinary capital	Up to 25% or 35% ordinary capital	Allowed
Foreign Investors	No difference between German or foreign investors	No difference between German or foreign investors	No difference between German or foreign investors	No difference between German or foreign investors	No difference between German or foreign investors

ADVERTISING EXPENDITURE & ECONOMIC DATA

Advertising expenditure

(Euro million, in current prices)

	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
Newspapers	7,340	7,583	7,972	8,143	8,694	7,998	7,711	7,926	8,001	8,172	8,441
Magazines	4,001	4,077	4,194	4,423	4,700	4,536	4,151	4,018	4,129	4,237	4,415
Television	3,526	3,803	4,042	4,317	4,705	4,552	4,361				
Radio	590	601	605	691	733	670	644				
Cinema	153	156	166	172	175	170	166				
Outdoor	531	512	563	682	746	750	787				
Internet	-	-	14	77	153	135	227				
Total	16,141	16,733	17,555	18,506	19,907	18,811	18,047	18,206	18,510	18,975	19,888

Source: 1996-2002 ZAW, 2003-2006 ZenithOptimedia

Notes: Excludes agency commission (of 15%) and production costs, includes classified advertising, after discounts, magazines include directories and trade titles, newspapers include dailies, weeklies, Sundays and supplements.

Main economic indicators 1996-2002

	1996	1997	1998	1999	2000	2001	2002
1 US\$=	1.09	Euro at 2002 rate					
Gross Domestic Product (Euro billion)							
at current prices	1,833	1,875	1,935	1,979	2,030	2,071	2,112
% change	1.8	2.2	3.2	2.3	2.6	2.0	2.0
at 2002 prices	1,982	1,989	2,034	2,067	2,079	2,098	2,112
% change	0.4	0.4	2.3	1.7	0.6	0.9	0.7
Gross Domestic Product per capita (Euro 000)							
at current prices	22.4	22.8	23.6	24.1	24.7	25.1	25.6
at 2002 prices	24.2	24.2	24.8	25.2	25.3	25.5	25.6
Population							
Millions	81.9	82.1	82.0	82.1	82.2	82.4	82.4
Consumer Price Index							
2002=100	92.5	94.3	95.1	95.7	97.6	98.7	100.0
% change	1.4	1.9	0.9	0.6	2.0	2.4	1.3
Ad.spend as a % of GDP							
	0.88	0.89	0.91	0.94	0.98	0.91	0.85
Advertising Expenditure Growth (%)							
at current prices	1.5	3.7	4.9	5.4	7.6	-5.5	-4.1
at 2002 prices	0.1	1.7	4.0	4.8	5.5	-7.7	-5.3

Source: IFS, ZenithOptimedia

**Research**

Circulation is audited by: Informationsgemeinschaft zur Feststellung der Verbreitung von Werbeträgern e.V. (IVW)

Readership is measured by: Arbeitsgemeinschaft Media-Analyse e.V. (AG.MA), Media-Micro-Census GmbH

Taxes

VAT on: sales 7% advertising 16%
 newsprint 16% plant 16%
 composition 16% (standard VAT rate 16%)

The tax rate on profits for newspapers is 53%.

Ownership

Are there any restrictions on ownership of publishing houses, or the registration of shares in newspaper-publishing companies? General ownership regulations apply to all businesses; there are no specific provisions for the press.

Is there any law prohibiting or restricting foreign companies or individuals from owning shares or majority stakes in domestic daily newspapers? No

Is there a law or rule making it possible to determine who actually owns a publishing company, in order to guarantee financial transparency and prevent silent partnerships? Newspapers are subject to the same transparency regulations as all other businesses.

Is there an antitrust law limiting concentration in the daily press? There are general competition laws to prevent excessive concentration. These laws have always had a strong influence on the development of the German press, and more so since the introduction in 1976 of specific controls on press mergers.

The competition laws regulate, among other things, discrimination and the right to impose prices on press products, and enable associations to draw up competition regulations for a specific sector and have them recorded in a register kept by the Federal Office of Monopoly Control.

It should be noted that the anti-monopoly laws preclude all agreements between newspaper publishers and magazine publishers, as well as those with direct competitors.

There is normally no restriction on mergers where combined turnover is below or equal to Euro 256 million. There are however several tests for whether press mergers qualify for regulation, and they are much more stringent. One is whether the new company's turnover is above Euro 13 million, but the preferred test is to look at copies sold. The ceiling for

dailies is 40,000 copies, which means that in effect the regulatory trigger for press is actually Euro 17 million. Companies with combined profits of Euro 5 million or less are exempted, but for press this is qualified by various revenue limits dependent on the type of periodical in question.

In the press sector, a planned merger must be declared in advance when the turnover reaches a minimum level, which ranges from Euro 26 million to Euro 51 million depending on circumstances. This duty to declare does not however enable the cartel authorities to exert power over or to forbid the merger. Otherwise, it would imply that all such agreements would favour or reinforce a pre-eminent position in the market, which is what the regulations are designed to prevent. There is a legal presumption that a one-third market share is pre-eminent, rebuttable with evidence that the annual turnover of the company concerned is less than Euro 128 million, or in the press sector, Euro 6 million. The creation of an oligopoly, when only a small number of suppliers operate in a market, is presumed in the press industry when the turnover reaches Euro 2.5 million. Mergers are permissible if the companies can show that competition is actually being increased, but few succeed with this argument. Companies have the right to appeal against decisions to the Federal Ministry of Economy, but it is very rarely used.

Although the notion of "market monopolisation" is at the core of the merger control, the legislature never defines the market concerned. In the government proposal at the time of enactment, it was established that such a market must be determined for each particular case, in relation to its concrete, local and chronological effects. There are two determining "markets" for the press: readership and advertising. If, for example, the merging of two publishing companies places them in a pre-eminent position in the advertising market, or reinforces their position in that market, the merger can be totally banned, regardless of its effect on the readership market. This is of major importance for agreements between dailies and advertising papers, for which the regulations pertaining to mergers in the press also apply.

The readership and advertising markets are themselves divided into several distinct categories, depending upon the nature of the paper and whether it is classified, for example, as subscription; local; "sensational"; or weekly.

Electronic media and printing houses are seen as belonging to different markets.

Are there plans to pass legislation regulating media concentration? Yes. The government is discussing new regulations and is expected to pass a new law in summer 2004.

GHANA

General economic situation

GDP total US\$ billion; GDP per capita US\$2,015 (purchasing power parity; 2002). Consumer price index 114.5 (2002).

Performance of newspapers vs. other media

Newspapers, radio and TV are mushrooming due to the new political dispensation. According to the National Communications Authority, Accra had one government-owned and 12 private FM radio stations, and there were approximately 40 private FM stations across the country. Most stations were independent and aired a wide range of viewpoints. There was one government owned television station that broadcast nationwide. There were two semi-private television stations that broadcast in the Greater Accra, Eastern, and Ashanti regions. There were three cable networks broadcasting in the Greater Accra region, two of which also broadcast in Kumasi. There was one private television station broadcasting in Kumasi.

Performance of different types of newspapers

There are up to 50 newspapers, journals and periodicals which appear regularly on the newsstands. There are more than a dozen newspapers including three government-owned dailies, the *Daily Graphic*, the *Ghanaian Times*, and the *Evening News*. Several privately owned newspapers increased to daily circulation from weekly or biweekly.

Circulation

Two of the government-owned dailies had national circulation. However, most newspapers circulated only in regional capitals, and many of the smaller private newspapers were available only in Accra.

Media/press laws

The government of President John Kufuor in 2001 repealed Ghana's criminal libel and sedition laws and otherwise eased pressure on the press. However, the 1994 Emergency Powers Act allows the government to censor news from disturbed areas.

State Support

The government ended its subsidy of one newspaper in 2001 and no longer finances any newspaper.

Codes of Ethics

The Ghana Journalists' Association, a media ethics committee created in 2001, successfully mediated several cases during 2002 that would ordinarily have gone to court.

Sources: CIA - *The World Factbook 2003*; *Freedom House*; *Commonwealth Press Union*; *US State Department*; *Committee to Protect Journalists*

POPULATION & MORE FACTS

Population by age and sex

	All individuals		Male		Female	
	000	%	000	%	000	%
0-14	7,960	39	4,022	39	3,938	38
15-64	11,770	58	5,860	57	5,910	58
65+	738	4	350	3	388	4
Total	20,468	100	10,232	100	10,236	100

Source: CIA - *The World Factbook 2003*

Top dailies (2003)

Title	Circulation (000)
Daily Graphic	100
Ghanaian Times	50
Evening News	10
Daily Guide	-
Accra Mail	-

Source: *Commonwealth Press Union* ; WAN from public sources

GREECE

Population by age and sex

	All individuals		Male		Female	
	000	%	000	%	000	%
0-14	1,661	15	857	16	804	15
15-24	1,562	14	818	15	744	13
25-39	2,501	23	1,270	23	1,231	22
40-54	2,183	20	1,082	20	1,101	20
55-64	1,200	11	569	11	631	11
65-79	1,497	14	684	13	814	15
80+	330	3	134	2	196	4
Total	10,934	100	5,413	100	5,521	100

Source: *National Statistics Services*

Population by social class and sex

	All adults		Male		Female	
	000	%	000	%	000	%
A+B	2,035	23	1,100	26	935	20
C1+C2	4,245	47	1,950	45	2,295	49
D+E	2,700	30	1,250	29	1,450	31
Total	8,980	100	4,300	100	4,680	100

Source: *National Statistics Services*

A= Upper middle class - higher managerial, administrative or professional

B= Middle class - intermediate managerial, administrative or professional

C1= Lower middle class - supervisory or clerical, and junior managerial, administrative or professional

C2= Skilled working class - skilled manual workers

D= Working class - semi and unskilled manual workers

E= Those at lowest levels of subsistence - state pensioners or widows (no other earners)

Age structure of readership

Age	% of readership	% daily reach within age group
13-17	9.8	45.4
18-24	14.5	52.0
25-34	19.2	59.6
35-44	18.0	62.3
45-54	15.6	58.4
55-70	23.0	47.2

Source: *Focus S.A.*

Newspaper reach (%)

	Daily
All adults	54.6
Men	63.5
Women	46

Source: *Focus S.A.*



Housewives (co-habiting persons)

	Housewives	
	000	%
under 25	240	7
25-34	850	26
35-44	870	27
45-54	580	18
55-64	270	8
65+	400	12
Total	3,210	100

Source: National Statistics Services

Households

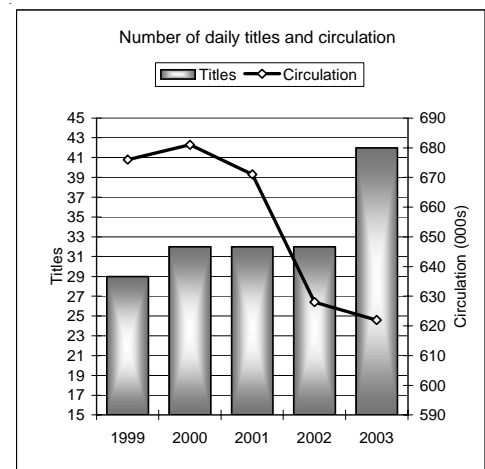
Occupancy	Households	
	000	%
1 person	726	19.8
2 people	1,032	28.1
3 people	773	21.1
4 people	753	20.5
5 or more people	386	10.5
without children	2,070	56.4
with children	1,600	43.6
with oldest child aged 0-3	421	11.5
with oldest child aged 4-9	425	11.6
with oldest child aged 10-15	715	19.5
Total	3,670	100

Source: Focus S.A.

NUMBER OF TITLES AND CIRCULATION

	1999	2000	2001	2002	2003	Change (%)	
						99/2003	2002/03
Number of titles							
Dailies	29	32	32	32	42	44.83	31.25
National dailies	-	-	-	-	39	-	-
Free dailies	-	-	-	-	3	-	-
Non-dailies	17	14	15	17	24	41.18	41.18
National non-dailies	-	-	-	17	23	-	35.29
Free non-dailies	-	-	-	-	1	-	-
Sundays	20	20	22	21	23	15.00	9.52
National sundays	-	-	-	21	23	-	9.52
Circulation (000)							
Dailies	676	681	671	628	622	-7.99	-0.96
Non-dailies	-	441	376	377	330	-	-12.47
Sundays	-	848	881	870	900	-	3.45
Total annual sales (millions of copies)							
Dailies	191	192	194	187	187	-2.10	0.04
Non-dailies	-	27	23	21	21	-	-0.05
Sundays	-	43	45	45	46	-	3.18

Financial papers not included



MORE FACTS

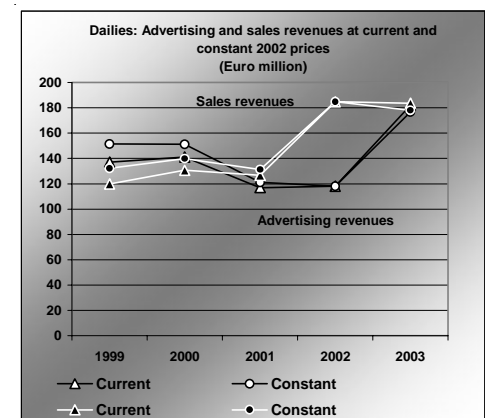
	1999	2000	2001	2002	2003	Change (%)	
						99/2003	2002/03
Advertising revenues (Euro million)							
Dailies	137.2	141.1	116.9	118.0	182.1	32.71	54.30
Dailies §	151.5	151.1	121.1	118.0	176.6	16.57	49.66
Non-dailies	35.8	48.1	35.4	31.5	26.1	-26.99	-17.02
Sundays	110.1	113.3	103.8	122.8	94.2	-14.43	-23.31
Sales revenues (Euro million)							
Dailies	119.8	130.6	126.7	184.8	183.6	53.26	-0.63
Dailies §	132.3	139.9	131.3	184.8	178.1	34.62	-3.62
Non-dailies	-	22.5	19.2	17.1	20.9	-	22.58
Sundays	-	39.0	49.2	56.5	56.1	-	-0.62
Volume of advertising sold (pages & page equivalents)							
Total *	80,190	85,050	72,650	35,000	38,200	-52.36	9.14
In colour	-	-	-	22,400	25,000	-	11.61

§ at constant 2002 prices

*includes non-dailies and Sundays

Ad revenues include inserts, production costs and agency commission.

Discounts range from 15-25%



Internet publishing (No. of online editions)

	1998	1999	2000	2001	2002
Dailies	10	12	13	13	15
Non-dailies	5	6	7	7	8

Cover prices

	Euro
Single copy	0.50-2.50

Contribution of display and insert advertising to total advertising income (%)

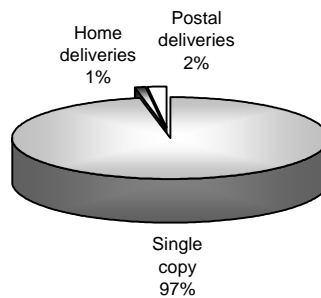
	1998	1999	2000	2001	2002
Display	91.5	91	90	90	88
Inserts	8.5	9	10	10	12



Type of newspaper sales (%)

	Subscriptions		
	Single copy	Home deliveries	Postal deliveries
1999	95	5	-
2000	95	5	-
2001	95	5	-
2002	98	2	-
2003	97	1	2

Type of newspaper sales in 2003 (%)



Media consumption (minutes per day)

	2003
Newspapers	30
Magazines	22
Radio	90
Television	230

Source: National statistics services

Top ten advertising categories (2003)*

Advertising sector	% of display ad revenue
Entertainment	15.1
Public sector	12.0
Financial organisations	6.6
Automobiles	6.3
Publishing	6.1
Travel agencies	5.6
Services	4.9
Mobile phone	4.6
Office equipment	3.9
Education	3.0

* For all newspapers

Top ten publishing companies (2003)

Publisher	Total circulation (000)	Total revenue (Euro 000)
Lamprakis Press	50,324	260,204
C.K. Tegopoulos	39,180	86,215
Kathimerini	19,397	68,225
Pegasus Publishing	26,515	55,418
Typoekdotiki	4,453	23,717
Press Foundation	14,129	20,446
Apogevmatini Publicat	7,096	9,477
Th. M. Nikolaidis	9,111	8,544
Ekdotisis	7,898	7,567
G.Georgalas	3,355	6,663

Source: A.D.N.P.A.

Top ten advertisers (2003)

Advertiser	Expenditure Euro (000)
O.P.A.P	7,943
Lexitel	4,856
Lidl s/m	3,773
Mediatel	3,477
Praktiker Hellas	2,166
Cosmote	2,150
Radio Korasidi	2,028
Travel Plan	1,737
Lannet	1,622
EFG Eurobank	1,447

Source: Media Services

Distribution and newsprint costs

	1999	2000	2001	2002	2003
As % of average cover price					
Single copy sales	28	28	28	26	26
Home deliveries	35	35	35	35	-
Postal deliveries	17	17	17	17	-
Average distribution cost per copy					
Subscription	Euro 0.24	0.25	0.28	0.35	-
Single copy	Euro 0.20	0.20	0.23	0.28	0.30
Newsprint costs (average per ton)					
Euro	585	-	779	620	575

Source: A.D.N.P.A.

Top ten dailies (2003)

Title	Publisher	Circulation (000)	Readership (000)	Cover price		Format
				Euro	US\$	
Ta Nea	Mr. Leon. Kara-Panagiotis	78	310	1.00	0.94	Tabloid
Eleftherotypia	Mr. TH. TEGOPOULOS	75	276	1.00	0.94	Tabloid
Ethnos	Mr. G. Bobolas	58	167	1.00	0.94	Tabloid
To Vima	Mr. Stavros Psycharis	53	64	1.00	0.94	Tabloid
Kathimerini	Mr.Th. Alafouzou	45	63	1.00	0.94	Broadsheet
Eleftheros Typos	Idrima Typoy S.A.	38	38	1.00	0.94	Tabloid
Sportime	Mrs. Frini Ontoti	32	109	1.00	0.94	Tabloid
To Fos Ton Spor	Mr. Theod. Nikolaidis	25	50	1.00	0.94	Broadsheet
Goal News	Haris Xidis	22	44	1.00	0.94	Tabloid
Protathlitis	Mr. S. Pouloupoulos	22	53	1.00	0.94	Tabloid

Daily newspaper colour capability & formats

Number of:	2001	2002	2003
4-colour newspapers	30	30	53
Broadsheets	7	6	8
Tabloids	25	26	32
Other	-	-	8



CROSS MEDIA OWNERSHIP

Owners	Regional TV	National TV	Regional Newspapers	National Newspapers
Regional TV Licensees	-	Not allowed	Allowed	Allowed
National TV Licensees	Not allowed	-	Allowed	Allowed
Regional Newspaper Owners	Allowed	Not allowed	-	Allowed
National Newspaper Owners	Not allowed	Not allowed	Allowed	-
Satellite TV Broadcasters	Not allowed	Not allowed	Allowed	Allowed
Foreign Investors	up to 25%	up to 25%	Allowed	Allowed

ADVERTISING EXPENDITURE & ECONOMIC DATA

Advertising expenditure	(Euro million, in current prices)										
	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
Newspapers	125.0	159.6	197.1	256.1	332.5	283.9	281.3	302.4	375.2	394.0	413.7
Magazines	191.0	273.8	326.7	380.8	490.3	556.6	627.9	684.7	808.9	865.5	908.8
Television	446.0	466.2	511.8	613.1	676.4	668.9	717.6				
Radio	65.8	65.8	55.8	69.0	71.3	72.2	89.9				
Cinema	3.6	4.8	5.6	7.0	12.5	12.9	13.5				
Outdoor	64.8	83.9	120.3	161.4	240.2	277.1	323.7				
Internet	-	-	-	-	-	2.0	2.1				
Total	896.2	1,054.1	1,217.3	1,487.4	1,823.2	1,873.6	2,056.0	2,144.7	2,470.0	2,559.8	2,639.6

Source: 1996-2003 Media Services, 2004-2006 ZenithOptimedia

Notes: Includes agency commission (15%), excludes production costs and classified advertising, before discounts, TV's 1996 fall was the result of changed measurement. Cinema is a ZenithOptimedia estimate for 1998.

Main economic indicators 1996-2002

	1996	1997	1998	1999	2000	2001	2002
1 US\$=	1.06						
	Euro at 2002 rate						
Gross Domestic Product Euro billion)							
at current prices	88	97	105	113	122	131	141
% change	9.9	10.3	8.7	6.9	7.9	7.7	7.8
at 2002 prices	110	115	119	124	130	136	141
% change	1.6	4.6	3.8	4.1	4.6	4.2	4.1
Gross Domestic Product per capita (Euro 000)							
at current prices	8.4	9.2	10.0	10.6	12.1	13.1	14.1
at 2002 prices	10.5	11.0	11.4	11.7	13.0	13.5	14.1
Population							
Millions	10.5	10.5	10.5	10.6	10.0	10.0	10.0
Consumer Price Index							
2002=100	79.8	84.2	88.2	90.6	93.4	96.5	100.0
% change	8.2	5.5	4.8	2.7	3.1	3.4	3.6
Ad.spend as a % of GDP							
	1.02	1.09	1.16	1.32	1.50	1.43	1.46
Advertising Expenditure Growth (%)							
at current prices	-29.2	17.6	15.5	22.2	22.6	2.8	9.7
at 2002 prices	-34.6	11.5	10.2	19.0	18.9	-0.6	5.9

Source: IFS, ZenithOptimedia



Research

Circulation is measured by: There is no audited body, but the figures given by the two main agencies (Argos and Europe).

Readership is measured by: FOCUS S.A.

Methodology: Multistage stratified cluster sampling.

Taxes

VAT on: sales 4% advertising 18%
 newsprint 18% plant 18%
 composition 4% (standard VAT rate 18%)

Profits are taxed at 35%.

Subsidies

Are there subsidies for purchasing newsprint? No

Are loans granted at low interest rates for re-equipping or improving existing equipment? No

Are there any direct subsidies? No

Discounts

on: telegraph 50% telex 50%

These reductions apply on post for newspapers and magazines:

Max. weight/copy (grams)	Reduction (%)	
	National newspapers	Regional newspapers
up to 20	80.0	90.0
up to 100	78.8	89.4
up to 250	71.7	85.8
up to 500	61.0	80.5
up to 1,000	53.3	76.7
up to 2,000	25.0	62.5

Each newspaper is allowed a discount for monthly telephone charges based on its circulation as follows:

Average monthly circulation	Charge units deducted
110,000-500,000	17,500
500,001-1,200,000	35,000
1,200,001-4,200,000	52,000
4,200,001+	105,000

Ownership

Does any law exist governing publishing-house ownership, or the registration of shares in newspaper-publishing companies? Shares may only be registered by individuals. Article 40 of Law 1806/88 allows the court to scrutinise the finances of press and broadcast companies. Ownership details must be submitted annually under pain of imprisonment. Article 24 of Law 1746/88 strictly compels registration except for foreign or domestic investment trusts holding 2.5% or less, state-owned concerns, and official political-party organs.

Is there any law prohibiting or restricting foreign companies or individuals from owning shares, and in particular, the majority of shares, of domestic daily newspapers? No

Is there any law prohibiting daily newspaper or periodical publishers from operating radio or television stations in the same locality? No. According to the law 2328/1995 (article 1 paragraph 10) "The participation in more than two different media (press, radio, TV) is prohibited."

So as to guarantee disclosure and transparency in the capital structure and to avert silent partnerships, is there a law or rule making it possible to determine who actually owns a publishing company? This is compulsory under Law 1746/88 ('Transparency in the Press'), Article 24, with exceptions enumerated above.

Is there an antitrust law limiting concentration in the daily press? Law 2328/95 ('Concentration') Article 13 and other regulation allows common ownership of:

- Up to two daily political newspapers, one a morning and one an evening, published in Athens, Piraeus, or Thessaloniki and distributed by a Press Distribution Agency, or by mail, or by its own means, plus up to two provincial dailies in two different prefectures
- **plus** either (a) a single Sunday title covering one of the political titles, or two political titles in one Sunday edition, or (b) a Saturday or Sunday edition of an independent newspaper distributed by a Press Distribution Agency.

Are there plans to legislate on media concentration? No

General economic situation

GDP total US\$1.1 billion; GDP per capita US\$19,642 (purchasing power parity; 2002). Consumer price index 101.6 (2002).

Performance of newspapers vs. other media

Kalaallit Nunaata Radio (Radio Greenland) broadcasts daily radio and TV programmes to the whole of Greenland. Programmes are in Greenlandic and Danish.

Performance of different types of newspapers

There are no daily newspapers in Greenland. *Atuagagdliutit/Gronlandsposten* is published twice a week, *Sermitsiaq* is the main weekly publication and *Niviarsiaq* is published monthly.

Sources: CIA – *The World Factbook 2003*; BBC; WAN from public sources

POPULATION & MORE FACTS

Population by age and sex

	All individuals		Male		Female	
	000	%	000	%	000	%
0-14	14	25	7	24	7	26
15-64	39	70	21	72	18	67
65+	3	5	1	3	2	7
Total	56	100	29	100	27	100

Source: CIA - *The World Factbook 2003*

	2002
Number of titles	
Non-dailies	2

Source: WAN from public sources

GRENADA

General economic situation

GDP total US\$440 million; GDP per capita US\$4,944 (purchasing power parity; 2002). Consumer price index 102.8 (2001).

Performance of newspapers vs. other media

The privately owned Grenadian Broadcasting Network (GBN), with a minority government share, owns the principal radio and TV stations; additional outlets are privately owned. A cable TV company operates in most areas of the country.

Performance of different types of newspapers

The country has no daily newspapers. All the newspapers in this island are weeklies. The three leading publications are

the *Grenadian Voice*, *Grenada Today* and the *Grenadian Informer*. All three are privately owned.

Sources: CIA – *The World Factbook 2003*; Freedom House; Commonwealth Press Union; BBC; US State Department

POPULATION

Population by age and sex

	All individuals		Male		Female	
	000	%	000	%	000	%
0-14	31	35	16	35	15	35
15-64	55	62	29	63	26	60
65+	3	3	1	2	2	5
Total	89	100	46	100	43	100

Source: CIA - *The World Factbook 2003*

GUATEMALA

POPULATION & MORE FACTS

Population by age and sex

	All individuals		Male		Female		Households 000
	000	%	000	%	000	%	
0-15	5,566	42	2,841	42	2,725	41	2,005
16-24	2,581	19	1,291	19	1,290	19	
25-34	1,904	14	953	14	951	14	
35-44	1,311	10	656	10	655	10	
45-54	851	6	425	6	426	6	
55-64	611	5	304	5	308	5	
65+	488	4	227	3	260	4	
Total	13,312	100	6,697	100	6,615	100	

Source: INE, Multivex, CNSS, CIA

Population by social class and sex

	All adults		Male		Female	
	000	%	000	%	000	%
A+B	425	7	211	7	214	7
C1	303	5	151	5	153	5
C2	1,699	28	844	28	855	28
D	2,306	38	1,145	38	1,161	38
E	1,335	22	663	22	672	22
Total	6,068	100	3,014	100	3,054	100

Source: INE, Multivex, CNSS, ZenithOptimedia

AB = university graduates, post-graduates, owners of businesses or sources of income, high-level administrative employees

C1 = high school or university graduates, private or public business executives, some owners of medium-sized businesses

C2 = grade school or high school graduates, professionals, businessmen, small industrialists, medium-ranked executives

D = grade school graduates, unskilled auxiliary or dependent workers in specialised activities

E = little or no education, no steady employment



Top dailies (2001)

Title	Circulation (000)	Readership (000)	Full page rate (Q)	
			Mono	Colour
Nuestro Diario	179	448	9,000	15,300
Prensa Libre	107	268	12,600	21,420
Al Dia	44	110	8,350	12,530
Siglo XXI	42	105	12,500	18,750
El Periodico	25	63	7,000	11,900
La Hora	20	50	5,000	8,500

Source: ZenithOptimedia

Top ten advertising categories (2000)

Advertising sector
Supermarkets & automarkets
Newspapers
Banks
Events
Telecommunications
Property
Electric stores
Department stores
Computers systems
Services & investments

Source: ZenithOptimedia

Top ten advertisers (2000)

Advertiser
Supermercados Paiz
La Torre
Tarjeta Libre
Econo Super
Hiper Paiz
Custom Homes
Banco De Guatemala
Telgua
Cemaco
Prensa Libre

Source: ZenithOptimedia

ADVERTISING EXPENDITURE & ECONOMIC DATA

Main economic indicators 1996-2002

	1996	1997	1998	1999	2000	2001	2002
1 US\$= 7.82 Quetzals at 2002 rate							
Gross Domestic Product (Quetzals billion)							
at current prices	95	108	124	135	150	165	182
% change	12.1	13.0	15.0	9.1	10.7	10.1	10.4
at 2002 prices	144	149	160	167	174	178	182
% change	17.4	3.4	7.4	4.1	4.5	2.3	2.2
Gross Domestic Product per capita (Quetzals 000)							
at current prices	9.3	10.3	11.5	12.2	13.1	14.1	15.6
at 2002 prices	14.1	14.2	14.8	15.0	15.3	15.2	15.6
Population							
Millions	10.2	10.5	10.8	11.1	11.4	11.7	11.7
Consumer Price Index							
2002=100	66.2	72.3	77.4	81.2	86.0	92.5	100.0
%change	11.1	9.2	7.0	4.8	6.0	7.6	8.1

Source: IFS, ZenithOptimedia

General economic situation

GDP total US\$18.69 billion; GDP per capita US\$2,070 (purchasing power parity; 2002). Consumer price index 106 (2002).

Performance of newspapers vs. other media

The Government owned and operated all domestic broadcast media including radio, which was the most important source of information for the public. Although the law permits private electronic media, the Government has never approved license requests for private radio and television stations, on the grounds of national security and stability. Many citizens listened regularly to foreign-origin shortwave radio. The Government did not restrict access to or distribution of foreign television programming via satellite or cable; although relatively few citizens could afford these services.

Performance of different types of newspapers

The Government published an official newspaper, the daily Horoya. Seven private newspapers, *Le Lynx*, *La Lance*, *L'Oeil*, *Le Democrat*, *L'Independant*, *La Nouvelle Tribune*, and *L'Observateur*, were published weekly in Conakry, and up to 10 other publications appeared sporadically, although technical difficulties and high operating impeded regular publication. *Le Lynx* and *La Lance*, under the same

management, had Internet web sites. One newspaper, *L'Espoir*, was affiliated with the governing political party, and several other newspapers were affiliated with opposition parties. However, because the literacy rate was only approximately 35% of the total population and the price of newspapers was beyond the reach of the average citizen, print media had a limited audience. High printing costs also severely restrict publishing.

Newspaper launches/closures

In December 2002, the government suspended three newspapers – *Croisade*, *Diplomate*, and *Defi* – for unspecified reasons.

Media/press laws

The Government prohibited talk or chants in public that it considered seditious, established defamation and slander as criminal offences, and prohibited communications that insulted the president; incited violence, discrimination, or hatred; or disturbed the public peace. Sanctions included fines, revocation of press cards, imprisonment, and banishment.

Sources: CIA – *The World Factbook 2003*; US State Department; BBC News

POPULATION & MORE FACTS

Population by age and sex

	All individuals		Male		Female	
	000	%	000	%	000	%
0-14	4,014	44	2,028	45	1,986	44
15-64	4,731	52	2,359	52	2,372	52
65+	285	3	124	3	161	4
Total	9,030	100	4,511	100	4,519	100

Source: CIA - *The World Factbook 2003*

Top dailies (2003)

	2002
Number of titles	
National dailies	1

Source: WAN from public sources

Title	Publisher
Horoya	Government

Source: WAN from public sources

General economic situation

GDP total US\$901.4 million; GDP per capita US\$663 (purchasing power parity; 2002). Consumer price index 104 (2002).

Performance of newspapers vs. other media

In 2000 the independent stations Radio Pidjiguiti and Radio Mavegro resumed broadcasting. National television broadcasts from 7 p.m. to midnight on weekdays and 5 p.m. to midnight on weekends. Privately-owned radio stations are on the edge of bankruptcy due to a lack of advertising.

Performance of different types of newspapers

The daily newspaper *Diario de Bissau*, closed in October 2001 by the Attorney General for causing "irreparable damage" to the independence of the nation and operating without a license, reopened in 2002. The *Diario's* publisher later ceased publishing the daily *Diario* and commenced publication of the weekly paper *Correio Guiné-Bissau*. Other newspapers, including *Gazeta de Noticias*, *Fraskera*, and the government-owned *No Pintcha*, were weeklies. All of the newspapers published only sporadically during the year due to financial constraints and dependence on the state-owned printing house. The private sector press is trying to survive in the general context of political and economic crisis. Most titles are no longer able to appear regularly.

Newspaper launches/closures

The daily newspaper *Gazeta de Noticias*, also closed in October 2001, did not open during 2002 due to high operating costs.

Circulation

The national printing press, the only facility for publishing newspapers in the country, often lacked the raw materials to publish them.

Media/press laws

In 2002, officials continued to use licensing and registration requirements as a pretext harass media outlets and to threaten them with closure.

Attorney General issued an order to all print and broadcast media forbidding them to publish or broadcast any press releases or information from the Guinean League of Human Rights (LGDH). The LGDH is known for its criticism of the ruling Social Renewal Party. The ban was lifted about two months later.

Journalists & Employment

In June 2002, employees of the national printing press went on a 15-day strike, demanding 17 months of salary arrears



and forcing all the country's newspapers, which rely on the printing press, to cease publication.

Employees of the RTGB, the national broadcasting company, went on several strikes during 2002 to demand better working conditions and payment of their salaries. Some RTGB journalists and technicians have not been paid for nearly two years.

Sources: CIA – The World Factbook 2003; US State Department; Reporters Without Frontiers

POPULATION

Population by age and sex

	All individuals		Male		Female	
	000	%	000	%	000	%
0-14	569	42	284	43	285	41
15-64	752	55	359	54	393	56
65+	39	3	17	3	22	3
Total	1,360	100	660	100	700	100

Source: CIA - The World Factbook 2003

GUYANA

General economic situation

GDP total US\$2.628 billion; GDP per capita US\$3,744 (purchasing power parity; 2002). Consumer price index 104.7 (2002).

Performance of newspapers vs. other media

The government owned and operated the country's sole radio station, which broadcast on three frequencies. There were no private radio stations, and private interests continued to allege that the government either denied or failed to respond to more than 20 requests for radio frequency authorizations. The government maintained that it was unable to grant frequencies to private stations because there was no legislation governing their allocation. However, despite a similar lack of legislation to govern television frequencies, there were 12 independent television stations in addition to the government station.

Performance of different types of newspapers

Of the three major newspapers in Guyana, two are dailies and one twice-weekly. The *Stabroek News* is a privately owned daily. The government's daily newspaper, the *Guyana Chronicle*, covered a broad spectrum of political and

nongovernmental groups. *The Mirror* published twice weekly is owned by a public company that is aligned to the ruling People's Progressive Party. A wide range of religious groups, political parties, and journalists published a variety of privately owned weekly newspapers.

Media/press laws

In May 2001, Prime Minister Samuel Hinds announced that the government no longer would tolerate unregulated broadcasting, and that all television stations would be required to adhere to existing legislation and obtain an official license. The existing laws – the Post and Telegraph Act and Wireless Telegraphy Regulations – were to remain in effect until a Commission on Broadcasting developed new broadcasting legislation. Conditions for obtaining a license included assurances that stations would not broadcast any program likely to offend the public, incite racial hatred or crime, or lead to public disorder. Twenty-two stations applied for broadcasting licenses, and the government granted 15 licenses in December 2001.

Sources: CIA – The World Factbook 2003; US State Department; Commonwealth Press Union

POPULATION & MORE FACTS

Population by age and sex

	All individuals		Male		Female	
	000	%	000	%	000	%
0-14	190	27	97	27	93	27
15-64	476	68	240	68	236	68
65+	36	5	16	5	20	6
Total	702	100	353	100	349	100

Source: CIA - The World Factbook 2003

Top dailies (2003)

Title	Publisher	Full page rate (G\$)	
		Mono	Colour
Stabroek News	Guyana Publications Inc.	50,400	75,600
Guyana Chronicle	-	-	-

Source: WAN from public sources

	2002
Number of titles	
National dailies	2

Source: WAN from public sources

General economic situation

GDP total US\$10.6 billion; GDP per capita US\$1,408 (purchasing power parity; 2002). Consumer price index 111.9 (2001).

Performance of newspapers vs. other media

With a literacy rate of approximately 52 percent and limited access to television, the most important medium is radio, especially those stations broadcasting in Creole. There are 275 private radio stations, with 43 in the capital alone. Most carried a mix of music, news, and talk show programs that many citizens regard as their only opportunity to speak out on a variety of political, social, and economic issues. Uncensored foreign satellite and cable broadcasts were available but limited in impact: most citizens could not afford televisions. The few stations carrying news or opinion broadcasts freely expressed a wide range of political viewpoints.

Performance of different types of newspapers

There are two major dailies, *Le Nouvelliste* and *Le Matin*, with a combined circulation of less than 20,000. Both are privately owned. There are three partisan weeklies distributed in both the United States and Haiti: the right-wing *Haiti Observateur*, and the leftist *Haiti Progres* and *Haiti En Marche*. There is virtually no Creole-language press.

Media/press laws

Although most radio stations and other forms of telecommunications were nominally independent, they are subject to a 1997 law designating the State sole owner and proprietor of the airwaves. The State leases broadcast rights to private enterprises, retaining pre-emption rights in the event of a national emergency, including natural disasters. The government did not exercise this right in practice.

Sources: CIA - *The World Factbook 2003*; US State Department; WAN from public sources

POPULATION & MORE FACTS

Population by age and sex

	All individuals		Male		Female	
	000	%	000	%	000	%
0-14	3,214	43	1,638	44	1,576	42
15-64	4,036	54	1,963	53	2,073	55
65+	278	4	132	4	146	4
Total	7,528	100	3,733	100	3,795	100

Source: CIA - *The World Factbook 2003*

Top dailies (2003)

Title
Le Nouvelliste
Le Matin

Source: WAN from public sources

	2002
Number of titles	
National dailies	2

Source: WAN from public sources

POPULATION & MORE FACTS

Population by age and sex

	All individuals		Male		Female		Households 000
	000	%	000	%	000	%	
0-15	2,742	42	1,401	43	1,341	41	1,169
16-24	1,344	20	675	21	669	20	
25-34	798	12	377	11	421	13	
35-44	652	10	320	10	332	10	
45-54	480	7	240	7	240	7	
55-64	305	5	161	5	144	4	
65+	238	4	112	3	126	4	
Total	6,559	100	3,286	100	3,273	100	

Source: Estadísticas y Censos/CIA

Population by social class and sex

	All adults		Male		Female	
	000	%	000	%	000	%
ABC1	662	10	341	11	321	10
C2	1,964	30	973	30	992	30
DE	3,933	60	1,906	59	2,027	61
Total	6,559	100	3,220	100	3,339	100

Source: Rivera Research, ZenithOptimedia

A = income greater than Lps 150,000 a month

BC1 = income between Lps 35,000-150,000 a month

C2 = income between Lps 10,000-35,000 a month

D = income between 2,000-10,000 a month

E = income less than Lps 2,000 a month

MORE FACTS

Top dailies (2002)

Title	Circulation (000)	Adult readership (000)	Full page rate (Lps)	
			Mono	Colour
La Prensa	60	139	11,648	27,373
La Tribuna	58	124	11,648	27,373
El Heraldo	55	111	11,648	27,373
Tiempo	50	120	11,648	27,373

Source: ZenithOptimedia

Top ten press advertising categories (2000)

Advertising sector	Press expenditure Lps (mill)
State	38.5
Banking	36.3
Supermarkets	34.6
Electrodomestic stores	22.5
Newspapers	18.8
Department stores	18.2
Movies	17.7
Fast food	16.0
Political	11.6
Malls	11.2

Source: SPC

Top ten press advertisers (2000)

Advertiser	Press expenditure Lps (mill)
La Colonia	20.1
Estado	19.7
Cerveceria Hondurena	16.8
Diunsa	14.8
Diario La Prensa	12.1
Celtel	9.8
La Curacao	9.1
Burger King	7.9
Televiscentro	7.5
Pizza Hut	7.0

Source: SPC

ADVERTISING EXPENDITURE & ECONOMIC DATA

Main economic indicators 1996-2002

	1996	1997	1998	1999	2000	2001	2002
1 US\$=	16.43	Lps at 2002 rate					
Gross Domestic Product (Lps billion)							
at current prices	48	61	70	77	89	99	108
% change	27.3	28.4	14.9	9.5	16.0	10.8	8.9
at 2002 prices	96	102	103	101	106	107	108
% change	2.8	6.8	1.0	-1.9	4.4	1.0	1.1
Gross Domestic Product per capita (Lps 000)							
at current prices	8.2	10.3	11.4	12.1	13.9	15.1	-
at 2002 prices	16.5	17.1	16.7	15.8	16.4	16.2	-
Population							
Millions	5.8	6.0	6.2	6.4	6.4	6.6	-
Consumer Price Index							
2002=100	50.0	60.1	68.3	76.2	84.7	92.9	100.0
% change	23.8	20.2	13.7	11.6	11.1	9.7	7.7
Ad.spend as a % of GDP							
	1.51	1.90	1.95	2.27	2.51	2.72	-
Advertising Expenditure Growth (%)							
at current prices	66.8	61.3	17.9	27.9	28.1	20.1	-
at 2002 prices	34.7	34.2	3.7	14.6	15.4	9.5	-

Source: IFS, ZenithOptimedia

Due to a lack of available data, the majority of charts in this entry have not been updated since the 2002 edition of World Press Trends. Those that have not been updated clearly state the year to which the data relates.

POPULATION

Population by age and sex

	All individuals		Male		Female		Households (000s)
	000	%	000	%	000	%	
0-14	1,099	16	568	17	531	15	2,131
15-24	898	13	450	14	448	13	
25-34	1,106	16	495	15	611	18	
35-44	1,367	20	645	20	722	21	
45-54	1,009	15	510	15	499	14	
55-64	514	8	274	8	240	7	
65+	768	11	355	11	413	12	
Total	6,761	100	3,297	100	3,464	100	

Source: HKSAR

Working population by social class and sex

	Adults		Male		Female	
	000	%	000	%	000	%
A	233	7	181	9	52	4
B	180	6	131	7	49	4
C	1,144	35	568	29	576	46
D	466	14	267	13	199	16
E	1,220	38	844	42	376	30
Total	3,243	100	1,991	100	1,252	100

Source: AC Nielsen

A = managerial, administrators

B = professionals

C = associate professionals, clerks

D = service workers, shop sales assistants

E = craft and related workers, plant and machine operators, elementary occupations, skilled agriculture and fishery

Age structure of readership (2000)

Age	% of readership	% reach within age group
15-24	14.7	77.9
25-34	18.5	79.8
35-44	24.6	86.0
45-54	17.2	86.0
55-59	5.6	84.1

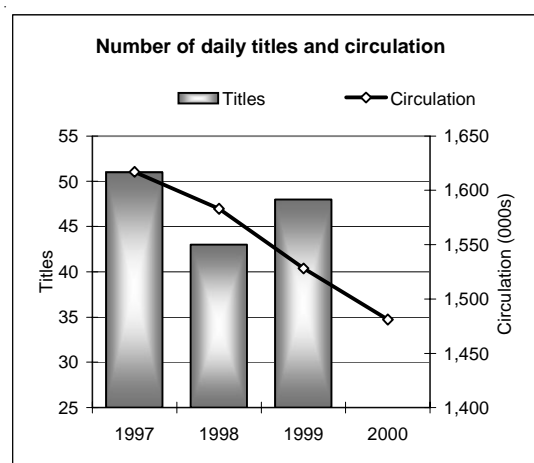
Source: AC Nielsen

Newspaper reach 2000 (%)

	Daily
All adults	80.4
Men	84.0
Women	77.0

NUMBER OF TITLES AND CIRCULATION

	1997	1998	1999	2000	2001	Change (%)	
						97/2000	99/2000
Number of titles							
Dailies	51	43	48	-	-	-	-
Circulation (000)							
Total dailies	1,617	1,583	1,528	1,481	-	-8.41	-3.08
National dailies	905	883	871	854	-	-5.64	-1.95
Regional dailies	295	316	318	298	-	1.02	-6.29
Local dailies	417	384	339	329	-	-21.10	-2.95
Non-dailies	60	60	63	66	-	10.00	4.76
Free papers	7,500	8,142	8,142	8,142	-	8.56	0.00
Total annual sales (millions of copies)							
Dailies	574	570	477	530	-	-7.67	11.11
Non-dailies	3	3	3	3	-	0.00	0.00
Free papers	390	423	423	423	-	8.46	0.00



MORE FACTS

Top ten dailies (2001)

Title	Circulation (000)	Readership (000)	Full page rate (HK\$)	
			Mono	Colour
Apple Daily	600	1,774	139,720	246,400
Oriental Daily	356	1,350	115,000	185,000
The Sun	302	-	56,100	108,000
Ming Pao Daily	200	497	60,000	106,000
Sing Pao Daily	186	-	51,000	117,000
Sing Tao Daily	120	108	59,800	145,550
HK Daily	104	283	83,538	180,306
HK Economic Times	100	239	60,000	129,000
HK Economic Journal	100	104	60,000	100,000
Wen Wei Pao	83	190	60,000	105,000

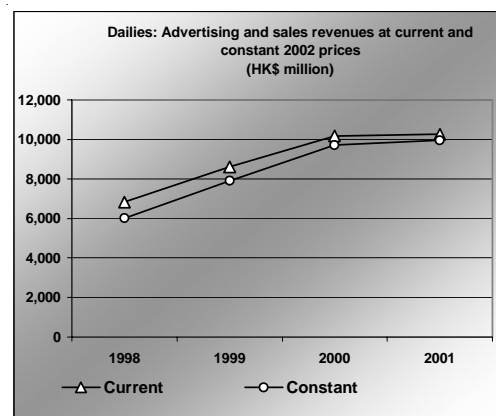
Source: Circulation - HKABC, readership - AC Nielsen



	1998	1999	2000	2001	2002	98/2001	2000/01
Advertising revenues (HK\$ million)							
Dailies & non-dailies	6,817	8,607	10,177	10,264	-	50.56	0.85
Dailies & non-dailies \$	6,012	7,905	9,715	9,956	-	65.59	2.48

Source: AC Nielsen

\$ at constant 2002 prices



Top ten advertising categories (2001)

Advertising sector	Expenditure HK\$ (000)
Residential property	759,357
Miscellaneous	672,664
Overseas travel	658,246
Media	498,973
Supermarkets	414,891
Financial announcements	409,468
Property (mainland China)	377,791
Education/schools	340,104
Banking/finance	327,169
Credit cards	323,416

Source: AC Nielsen

Top ten advertisers (2001)

Advertiser	Expenditure HK\$ (000)
Park 'n' Shop	215,990
Wellcome Supermarket	153,496
PCCW	138,231
Hong Tai Travel	135,712
Oriental Daily News	92,076
HSBC	91,872
Ananda Travel	79,607
Hang Seng Bank	68,115
BEA	63,280
Watson's Super Store	59,279

Source: AC Nielsen

ADVERTISING EXPENDITURE & ECONOMIC DATA

Main economic indicators 1996-2002

	1996	1997	1998	1999	2000	2001	2002
1 US\$=	7.80						
	HK\$ at 2002 rate						
Gross Domestic Product (HK\$ billion)							
at current prices	1,211	1,345	1,280	1,246	1,288	1,279	1,269
% change	10.5	11.1	-4.8	-2.7	3.4	-0.7	-0.8
at 2002 prices	1,163	1,220	1,129	1,144	1,229	1,241	1,269
% change	3.9	4.9	-7.5	1.4	7.4	0.9	2.3
Gross Domestic Product per capita (HK\$ 000)							
at current prices	188.0	207.2	195.7	188.5	193.1	190.3	188.9
at 2002 prices	180.5	188.0	172.6	173.1	184.3	184.6	188.9
Population							
Millions	6.4	6.5	6.5	6.6	6.7	6.7	6.7
Consumer Price Index							
2002=100	104.2	110.2	113.4	108.9	104.8	103.1	100.0
%change	6.3	5.8	2.8	-4.0	-3.8	-1.6	-3.0
Ad.spend as a % of GDP	1.40	1.52	1.65	1.93	2.14	1.14	1.14
Advertising Expenditure Growth (%)							
at current prices	12.4	20.1	3.5	14.0	14.8	-47.4	-0.9
at 2002 prices	5.7	13.5	0.6	18.7	19.3	-46.5	2.2

Source: IFS, ZenithOptimedia

Advertising expenditure

(HK\$ millions, in current prices)

	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
Newspapers	5,048	6,717	6,817	8,607	10,177	6,158	6,612	5,952	6,249	6,101	6,250
Magazines	2,022	2,420	2,160	2,755	3,679	1,887	1,706	1,562	1,640	1,601	1,640
Television	8,437	9,563	10,515	11,101	11,608	5,010	4,457				
Radio	917	1,089	1,024	915	1,010	558	688				
Cinema	44	85	77	23	12	28	24				
Outdoor	516	525	514	659	1,019	820	845				
Internet	0	0	0	0	111	78	78				
Total	16,984	20,399	21,107	24,060	27,616	14,539	14,410	14,650	15,587	15,419	15,939

Source: 1996-2002 HK Adex SRG, 2003-2006 ZenithOptimedia

Notes: Includes agency commission, before discounts to 2000, after discounts from 2001, excludes production costs and classified

Commentary – Hungarian Newspaper Publishers Association

The readership of quality newspapers in Hungary is decreasing, but tabloids are up, which compensates for the decrease. There is also a slight decrease in the regional press. The Sunday newspaper market is stable.

In 2003, the Competition Agency prevented media concentration in several cases – for example, one company owning too many dailies with high circulations.

POPULATION

Population by age and sex

	All individuals		Male		Female	
	000	%	000	%	000	%
0-14	1,744	17	893	19	851	16
15-29	2,292	23	1,172	24	1,120	21
30-39	1,270	13	639	13	630	12
40-59	2,808	28	1,348	28	1,460	28
60-69	968	10	420	9	548	10
70+	980	10	344	7	636	12
Total	10,062	100	4,817	100	5,245	100

Source: Central Statistic Office, national census

Housewives (co-habiting persons)

	Housewives	
	000	%
under 25	304	7
25-34	738	17
35-44	780	18
45-54	945	22
55-64	611	14
over 65	1,011	23
Total	4,389	100

Source: Szonda Ipsos

Households

Household type	Adults	
	000	%
1 person	1,319	16
2 people	2,375	28
3 people	1,815	22
4 people	1,815	22
5 or more people	1,042	12
without children	5,272	63
with children	3,094	37
with children aged 0-2	518	6
with children aged 3-6	793	9
with children aged 7-14	1,737	21
with children aged 15-17	1,246	15
Total	8,366	100

Source: Szonda Ipsos

Population by class and sex

	All adults		Male		Female	
	000	%	000	%	000	%
AB	1,268	16	600	16	668	16
C1	519	7	255	7	264	6
C2	1,421	18	630	17	791	19
DE	4,425	1,547	2,093	1,574	2,332	1,524
NA	286	4	133	4	153	4
Total	7,919	1,591	3,711	1,617	4,208	1,569

Source: Szonda Ipsos

A= Upper middle class

B= Middle class

C1= Lower middle class

C2= Skilled working class

D= Unskilled working class

E= Subsistence

NA= No response

Age structure of readership

Age	% of readership	% daily reach within age group
15-24	17.1	49.2
25-34	19.1	53.0
35-44	18.8	59.2
45-54	20.1	59.5
55-64	12.2	53.2
65+	12.8	43.3

Source: Szonda Ipsos

Newspaper reach (%)

	Daily
All adults	52.6
Men	56.1
Women	49.5
MHS	51.2

Source: Szonda Ipsos

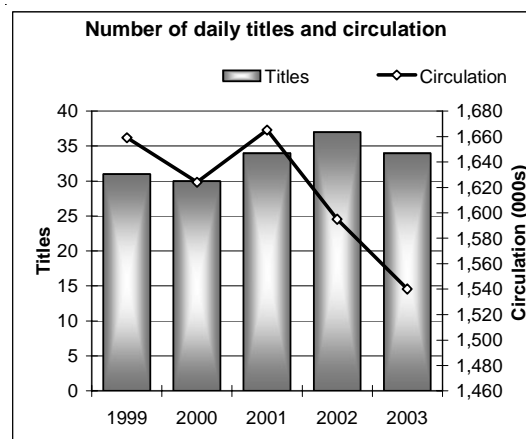
MHS: Main Household Shopper

NUMBER OF TITLES AND CIRCULATION

	1999	2000	2001	2002	2003	Change (%)	
						99/2003	2002/03
Number of titles*							
Total dailies	31	30	34	37	34	9.68	-8.11
National dailies	8	8	10	9	9	12.50	0.00
Regional and local dailies	23	22	24	28	25	8.70	-10.71
National non-dailies	169	167	188	195	203	20.12	4.10
Sundays	3	3	4	4	4	33.33	0.00
Free papers	2	21	22	22	32	1500.00	45.45
Circulation (000)							
Total dailies	1,659	1,624	1,665	1,595	1,540	-3.86	-3.45
National dailies	793	772	784	765	750	-3.53	-1.96
Regional and local dailies	866	852	881	830	790	-4.16	-4.82
Non-dailies	-	-	-	-	-	-	-
Sundays	190	184	185	365	388	92.11	6.30
Free papers	190	210	270	322	320	69.47	-0.62
Total annual sales (millions of copies)							
Dailies	514	488	515	474	469	-7.83	-1.05
Sundays	10	9	9	18	20	82.19	11.11
Free papers	24	24	26	69	78	190.53	13.04

Source: Mediagnosis, Szonda Ipsos

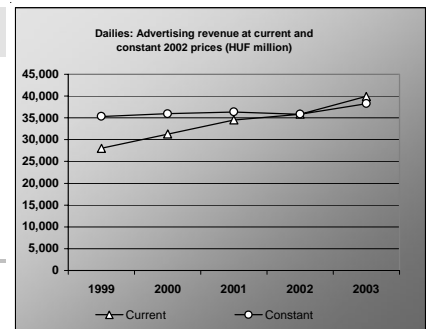
* Only titles measured by Mediagnosis





MORE FACTS

	1999	2000	2001	2002	2003	Change (%)	
						99/2003	2002/03
Advertising revenues (HUF million)*							
Total dailies	28,014	31,313	34,528	35,850	39,913	42.48	11.33
<i>National dailies</i>	13,693	15,601	16,527	15,374	16,782	22.56	9.16
<i>Regional and local dailies</i>	14,321	15,712	18,001	20,476	23,131	61.52	12.97
Total dailies §	35,327	35,977	36,350	35,850	38,267	8.32	6.74
Non-dailies	24,554	28,203	31,358	33,869	37,814	54.00	11.65
Sundays	134	311	495	639	779	481.34	21.91
Free papers	2,912	4,855	6,928	8,070	9,522	226.99	17.99
Volume of advertising sold (pages & page equivalents)							
Total	88,372	98,261	100,032	101,630	106,171	20.14	4.47
Colour	49,706	60,743	66,444	70,086	76,122	53.14	8.61



Source: Mediagnozis

§ at constant 2002 prices

* Figures include classifieds, inserts and ad agency commission.

The figures are at ratecard; the typical discount available to advertisers from rate card is between 18 and 25%.

Classified, display and insert revenue (%)

Daily newspapers	1999	2000	2001	2002	2003
Display	82.3	86.9	87.6	86.2	86.6
Classified	16.5	12.0	11.1	12.4	11.9
Inserts	1.3	1.1	1.3	1.4	1.5

Cover prices (2001)

	HUF
Single copy	46-170

Top ten advertising categories (2003)

Advertising sector	% of display ad revenue
Services	17.3
Trade	14.8
Transport/auto	12.9
Banking/insurance	10.8
Publishing/mass media	9.1
Computers/office technology/telecoms	8.4
Leisure/entertainment	4.8
Travel/tourism	4.4
Company reporting	2.9
Education/training	2.1

Source: Mediagnozis

Top ten publishing companies (2003)

(ranked by total revenue)

Sanoma Budapest Kiadói
Axel Springer Magyarország
Ringier-H
Népszabadság
Pesti Est
Pannon Lapok Kiadói
Axel Springer Budapest
MTG Metro Gratis
HVG
Inform Stúdió

Source: Szonda Ipsos

Top ten newspaper advertisers (2003)

Advertiser	Newspaper expenditure HUF (000s)
Pannon GSM	1,867,300
L'Oreal	1,204,964
Magyar Távközlési	1,147,316
Westel Mobil	935,152
Vodafone Magyarország	908,090
Telemédia	884,537
Unilever Magyarország	702,030
Szerencsejáték	685,284
Intercom	682,610
UPC Magyarország	583,257

Source: Mediagnozis

Top ten dailies (2003)

Title	Publisher	Circulation (000)	Readership (000)	Cover Price		Format	Full page rate* (HUF 000)	
				HUF	US\$		Mono	Colour
Metro	MTG Metro Gratis	320	575	free	free	Tabloid	-	2,800
Blikk	Ringier Kiadói	242	952	63	0.24	Tabloid	1,310	1,769
Népszabadság	Népszabadság	172	605	93	0.36	Broadsheet	2,200	3,183
Nemzeti Sport	Ringier Kiadói	96	260	88	0.34	Broadsheet	959	1,342
Kisalföld	Lapcom	79	247	85	0.33	Broadsheet	845	1,180
Vas Népe	Pannon Lapok Társasága Kiadói	58	180	56	0.22	Broadsheet	786	1,181
Zalai Hírlap	Pannon Lapok Társasága Kiadói	58	201	56	0.22	Broadsheet	796	1,197
Kelet-Magyarország	Inform Média	58	182	71	0.28	Broadsheet	-	-
Napló	Pannon Lapok Társasága Kiadói	52	185	56	0.22	Broadsheet	-	-
Hajdú-Bihari Napló	Inform Média	51	164	65	0.25	Broadsheet	-	-

Source: Szonda Ipsos

* 2002 data


CROSS MEDIA OWNERSHIP

Owners	Regional TV	National TV	Regional newspapers	National newspapers	Radio
Regional television licensees	No holding in stations with more than 20% signal overlap	-	No holding permitted if more than 80% overlap between circulation and signal areas	-	-
National TV licensees	No holding permitted	No other holding permitted		No holding permitted	No holding permitted
Regional newspaper owners	No holding permitted if more than 80% overlap between circulation and signal areas	-	-	-	-
National newspaper owners	-	No holding permitted	-	-	-
Local radio licensees	No holding in stations with more than 20% signal overlap	-	No holding permitted if more than 80% overlap between circulation and signal areas	-	-
National radio licensees	No holding permitted	No holding permitted	-	No holding permitted	No other holding permitted
Foreign investors	-	At least 26% of shares must be Hungarian-owned	-	-	At least 26% of shares in national radio stations must be Hungarian-owned

ADVERTISING EXPENDITURE & ECONOMIC DATA
Advertising expenditure
(HUF million, in current prices)

	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
Newspapers	17,748	22,389	25,494	29,302	32,991	37,394	39,522	44,253	51,951	62,936	74,389
Magazines	11,166	15,253	21,316	26,339	31,691	35,913	38,906	43,774	50,559	61,518	72,901
Television	29,287	49,808	80,727	94,935	129,605	159,474	204,058				
Radio	6,321	7,003	7,613	10,280	12,042	13,104	14,429				
Cinema	279	515	458	824	1,076	1,146	1,089				
Outdoor	6,149	7,412	9,729	11,304	16,680	19,743	21,233				
Total	70,950	102,380	145,338	172,984	224,086	266,774	319,237	370,227	449,013	525,343	619,907

Source: 1996-2003 Mediagnosis, 2004-2006 ZenithOptimedia
Notes: Excludes agency commission and production costs, before discounts, classified included from 1996.
Main economic indicators 1996-2002

	1996	1997	1998	1999	2000	2001	2002
1 US\$=	257.89	HUF at 2002 rate					
Gross Domestic Product (HUF billion)							
at current prices	6,894	8,541	10,087	11,394	13,172	14,850	16,980
% change	22.8	23.9	18.1	12.9	15.6	12.7	14.3
at 2002 prices	12,927	13,536	14,003	14,368	15,134	15,633	16,980
% change	10.3	4.7	3.4	2.6	5.3	3.3	8.6
Gross Domestic Product per capita (HUF 000)							
at current prices	676.5	841.4	997.8	1,131.4	1,314.6	1,496.9	1,711.7
at 2002 prices	1,268.6	1,333.6	1,385.0	1,426.8	1,510.4	1,575.9	1,711.7
Population							
Millions	10.2	10.2	10.1	10.1	10.0	9.9	9.9
Consumer Price Index							
2002=100	53.3	63.1	72.0	79.3	87.0	95.0	100.0
% change	23.4	18.3	14.2	10.1	9.8	9.1	9.1
Ad.spend as a % of GDP							
	1.03	1.20	1.44	1.52	1.70	1.80	1.88
Advertising Expenditure Growth (%)							
at current prices	47.3	44.3	42.0	19.0	29.7	18.9	19.7
at 2002 prices	19.4	22.0	24.3	8.1	18.1	9.0	13.7

Source: IFS, Mediagnosis, ZenithOptimedia



Research

Circulation is audited by: Magyar Terjesztés Ellenőrzési Szövetség (MATESZ, or Hungarian Audit Bureau of Circulation)

Readership is measured by: Szonda Ipsos-GfK Hungary

Methodology: Face-to-face interviews using a sample of 30,000 individuals (15+ years old).

Taxes

VAT on:

sales 12%	advertising 25%
newsprint 25%	plant 25%
composition 12%	
(standard VAT rate 12%/25%)	

There is a 1% tax on net single copy price and 1% on advertising which goes toward the National Cultural Fund. Publishers pay 18% tax on profits.

Ownership

Does any law exist governing publishing-house ownership or the registration of shares in newspaper-publishing companies? No

Is there any law prohibiting or restricting foreign companies or individuals from owning shares, and in particular, the majority of shares, of domestic daily newspapers? No

Is there any law prohibiting daily newspaper or periodical publishers from operating radio or television stations in the same locality? Yes. Regional newspaper publishers may not hold shares in regional radio or television broadcasters whose signal areas overlap the publisher's circulation area by more than 80%. National newspapers may not acquire holdings in any broadcaster over 25%.

So as to guarantee disclosure and transparency in the capital structure and to avoid silent partnerships, is there a law or rule making it possible to determine who actually owns a publishing company? No

Is there an anti-trust law limiting concentration in the daily press? No

Is further regulation of media concentration expected? No

POPULATION

Population by age and sex

	All individuals		Male		Female		Households 000
	000	%	000	%	000	%	
Children	70	24	36	25	34	24	160
16-24	38	13	20	13	19	13	
25-34	41	14	21	14	20	14	
35-44	43	15	21	15	21	15	
45-54	38	13	19	13	19	13	
55-64	26	9	13	9	13	9	
65+	34	12	15	11	19	13	
Total	291	100	145	100	145	100	

Source: Statistics Iceland

Newspaper reach (%)

All adults	Daily
	80.5

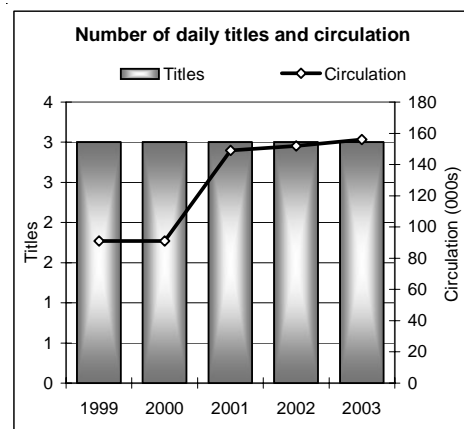
Source: IM Gallup, October 2002

NUMBER OF TITLES AND CIRCULATION

	1999	2000	2001	2002	2003	Change (%)	
						99/2003	2002/03
Number of titles *							
Dailies	3	3	3	3	3	0.00	0.00
National dailies	3	3	2	2	2	-33.33	0.00
Free dailies	-	-	1	1	1	-	0.00
Non-dailies	22	20	21	23	26	18.18	13.04
National non-dailies	2	2	2	2	2	0.00	0.00
Regional & local non-dailies	11	9	10	10	10	-9.09	0.00
Free non-dailies	9	9	9	11	14	55.56	27.27
Circulation (000) *							
Dailies	91	91	149	152	156	71.43	2.63
National dailies	91	91	79	76	70	-23.08	-7.89
Free dailies	-	-	70	76	86	-	13.16
Non-dailies	57	57	58	74	-	-	-
National non-dailies	12	13	10	6	-	-	-
Regional non-dailies	16	16	14	17	-	-	-
Free non-dailies	29	28	34	51	-	-	-
Total annual sales (000s)							
National dailies	26,000	28,000	23,500	21,900	-	-	-
Non-dailies	1,500	1,400	1,200	-	-	-	-
Free papers	1,400	1,400	13,300	22,600	-	-	-

Source: Statistics Iceland

* newspapers publishing at the end of the year



MORE FACTS

	1999	2000	2001	2002	2003	Change (%)	
						99/2002	2001/02
Advertising revenues (ISK million)							
Total dailies	2,476	2,707	2,432	2,409	2,938 *	-2.71	-0.95
Dailies §	2,913	3,030	2,557	2,409	2,909 *	-17.31	-5.80
Non-dailies	259	294	288	357	-	37.87	23.96
Paid-for non-dailies	163	183	175	216	-	32.80	23.43
Free non-dailies	96	111	113	141	-	46.45	24.78
Sales revenues (ISK million)							
Dailies	1,580	1,561	1,622	1,567	-	-0.82	-3.39
Dailies §	1,859	1,747	1,706	1,567	-	-15.71	-8.12
Non-dailies	142	158	146	129	-	-9.15	-11.64

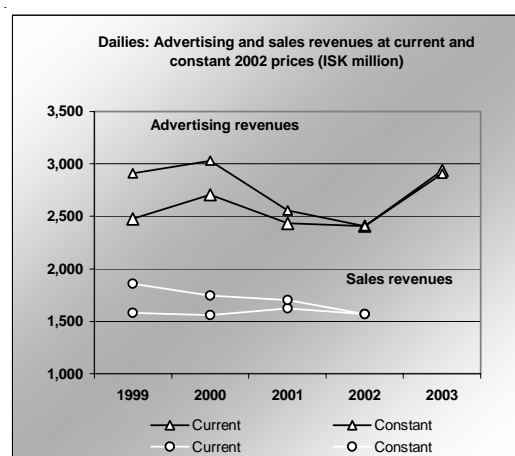
Source: Statistics Iceland

Figures include classified and inserts, exclude VAT

Figures are at rate card prices

* WAN/ZenithOptimedia estimate

§ at constant 2002 prices



Top dailies (2003)

Title	Publisher	Circulation	Format
Fréttablaðið	Frétt ehf.	85,610	Tabloid
Morgunblaðið	Árvakur hf.	52,321	Tabloid
DV	Frétt ehf.	18,000 *	Tabloid

Source: Statistics Iceland

* estimated

Contribution of classified, display and insert advertising to total advertising income (%)

	1999	2000	2001	2002	2003
Display	94.4	95.5	95.7	95	94
Classified	5.6	4.5	4.3	5	6

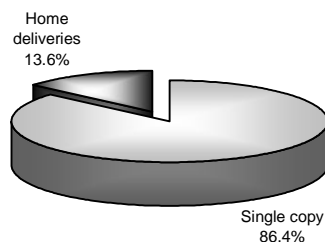
Source: IM Gallup/Statistics Iceland



Type of newspaper sales (%)

	Single copy	Home deliveries
1998	91.0	9.0
1999	90.0	10.0
2000	90.6	9.4
2001	87.2	12.8
2002	86.4	13.6

Type of newspaper sales in 2002 (%)



Top ten advertising categories (2003)

Advertising sector	% of display ad revenue
Property	14
Grocery stores and supermarkets	7
Cinemas	7
New cars	4
Furniture	3
Banking	3
Computers, software/hardware	3
Travel agencies	3
Books and bookshops	3
Mass media	2

Source: IM Gallup

Top publishing companies (2003)

	Total circulation
Frétt ehf.	103,610
Árvakur hf.	52,321

Source: Statistics Iceland

Cover prices (2002)

	ISK
Single copy	190-200
Subscription*	85-89

*per issue

Newspaper colour capability & formats

Number of:	1999	2000	2001	2002	2003
4-colour newspapers	3	3	2	2	24
Tabloid	3	3	2	2	-

Source: Statistics Iceland

1999-2002 figures are for national dailies only

Media consumption (ages 12-80, minutes per day)

	1999	2000	2001	2002	2003
Radio	197	204	203	188	217
Television	100	147	161	185	173
Internet*	38	-	-	-	-

Source: IM Gallup

*ages 16-75

Employment (dailies only)

	1998	1999	2000	2001	2002
Total no. of employees	767	716	729	439	582

Source: Statistics Iceland

Internet publishing (No. of online editions)

	1999	2000	2001	2002	2003
Dailies	3	3	3	3	3
Non-dailies	6	8	10	11	16

Source: Statistics Iceland

Online readership *

Newspaper	2001	2002	2003	
Morgunblaðið/Árvakur hf.	www.mbl.is	1,576,357	1,755,104	2,876,249
Fréttablaðið and DV/Frétt ehf.	www.visir.is	-	-	592,598
Víkurfrettir/Víkurfrettir ehf.	www.vikurfrettir.is	-	-	41,730

Source: Modernus Ltd (www.teljari.is)

*page impressions per week

ADVERTISING EXPENDITURE & ECONOMIC DATA

Main economic indicators 1996-2002

	1996	1997	1998	1999	2000	2001	2002
1 US\$=	91.66						
							ISK at 2002 rate
Gross Domestic Product (ISK billion)							
at current prices	485	513	568	609	662	744	778
% change	7.5	5.7	10.7	7.4	8.6	12.3	4.7
at 2002 prices	610	633	689	717	741	782	778
% change	5.1	3.8	8.8	4.0	3.3	5.5	-0.4
Gross Domestic Product per capita (ISK 000)							
at current prices	1,797	1,899	2,102	2,177	2,364	2,656	2,703
at 2002 prices	2,259	2,346	2,553	2,561	2,646	2,792	2,703
Population							
Millions	0.3	0.3	0.3	0.3	0.3	0.3	0.3
Consumer Price Index							
2002=100	79.5	80.9	82.3	85.0	89.3	95.1	100.0
% change	2	2	2	3	5	6	5
Ad.spend as a % of GDP							
	-	-	-	1.17	1.30	1.14	1.08
Advertising Expenditure Growth (%)							
at current prices	-	-	-	-	20.8	-1.5	-0.9
at 2002 prices	-	-	-	-	14.9	-7.5	-5.8

Source: IFS, Statistics Iceland, IM Gallup, ZenithOptimedia

**Advertising expenditure (ISK millions, in current prices)**

	1999	2000	2001	2002	2003
Newspapers	4,340	4,699	4,522	4,887	6,272
Magazines	603	697	784	609	734
Television	2,043	2,823	2,804	2,556	2,972
Radio	0	0	0	0	0
Cinema	62	100	62	35	0
Outdoor	69	279	289	307	270
Internet	0	0	8	0	0
Total	7,117	8,598	8,469	8,393	10,248

Source: IM Gallup

Research

Circulation is audited by: The Iceland Chamber of Commerce audits the paid-for daily *Morgunblaðið* and the free daily *Fréttablaðið*.

Readership is measured by: Gallup, on behalf of the Icelandic Association of Advertising Agencies and some of the larger media companies.

Methodology: Surveys are twice per year, in March and October, and based on diary method (media use for one week). Sample size is 1,300-1,600 people aged between 12 and 80.

Taxes

VAT on: sales 14% advertising 24.5%
 newsprint 24.5% plant 24.5%
 composition 24.5% (standard VAT rate 24.5%)

Advertising and bill-posting are both taxed at the standard rate of 24.5%.

Newspapers pay the standard 18% tax on profit.

Subsidies

Are there subsidies for the purchase of newsprint? No

Are loans granted at low interest rates for re-equipping or improving existing equipment? No

Discounts

on: post 50%+* telephone 0 telegraph 0 telex 0

* Depends upon the weight. Discounts are given for postal

delivery of newspapers and magazines to subscribers only.

Ownership

Does any law exist governing publishing-house ownership, or the registration of shares in newspaper-publishing companies? No

Is there any law prohibiting or restricting foreign companies or individuals from owning shares, and in particular, the majority of shares, of domestic daily newspapers? No restrictions on individuals or companies domiciled in the European Economic Area (EU + Iceland + Norway + Liechtenstein). Other foreign individuals and companies are subject to general regulations set for foreign capital investment.

Is there any law prohibiting daily newspaper or periodical publishers from operating radio or television stations in the same locality? No

So as to guarantee disclosure and transparency in the capital structure and to avert silent partnerships, is there a law or rule making it possible to determine who actually owns a publishing company? No

Is there an antitrust law limiting concentration in the daily press? No. There are no laws directed specifically at the daily press or any other mass medium. There are however, general anti-trust laws and a regulatory/surveillance body for the supervision of possible restrictive business practices. The laws do not provide an exact 'threshold' of what is or should be conceived as an unlawful market barrier.

Is further regulation of media concentration expected? No

The INS Press Handbook has been used as a source in some sections of this chapter, however this does not indicate the complete position relating to the print media for the whole of India as the INS Press Handbook covers only information relating to INS member publications.

General economic situation

India is the world's largest democracy and more than usually turbulent market with complex social changes, plus rising literacy and GDP.

Performance of newspapers vs. other media

Among the different media options in the country, the reach (all India) of terrestrial television (1/week) is the highest, at 51%, according to the Indian Readership Survey, Round 1, 2003-04. Cable and satellite television (all) is at 24%, followed by print at 23%. Radio (1/week), cinema (1/month) and Internet (1/week) occupy the next three positions, at 16%, 5% and 1%, respectively.

In the electronic media, 80% of the channels are privately owned, and 20% are operated by Doordarshan, a semi-autonomous body controlled by the government.

TV-set owning households increased from 68.8 million in 1999 to 81.6 million in 2002, registering a growth of about 19%. This growth was largely driven by rural India (26%). Of the 12.8 million new TV households, 66% went for a colour TV.

Cable and satellite growth of 37% outpaced that of television, with 29.4 million cable and satellite homes in 1999 and 40.4 million in 2002. The rural growth outpaced the urban.

Television no longer is a government monopoly. Private satellite television is distributed widely by cable or satellite dish in throughout the country. These channels provide substantial competition for Doordarshan TV (DDTV), both in presentation and credibility. DDTV has a network of three national channels, two special-interest channels, 10 regional language channels, four state networks, an international channel, and studios in 41 cities. The Primary Channel operates through transmitters across the country, bringing programming to more than 87% of the population. The company's three-tier service provides news, science, culture and drama programming through the national service (broadcast in English and Hindi), similar regional language programming through the regional service, and coverage of local issues in local languages through the local service. Metro channels, linked by satellite, are available in Delhi, Mumbai, Calcutta and Chennai. Doordarshan is supported in part by advertisements.

Radio-set ownership in urban India dropped from 43.6 million households in 1999 to 38.6 million households in 2002, a decline of 12%. Overall reach of radio in urban India dropped from 27% in 1999 to 24% in 2002. Reach of FM stations grew from 19.2% in 1999 to 31.2% in 2002.

AM radio broadcasting remains a government monopoly. Private FM radio station ownership was legalized during 2000, but licenses only authorized entertainment and educational content. All India Radio (AIR), or Akashvani, is India's government-owned radio network with a mission to inform and educate the people in addition to providing entertainment. The network includes 194 radio stations, providing radio coverage to more than 97% of the population. AIR broadcasts music, drama, news and sports programs in various languages, as well as those focusing on farm and family welfare issues. In addition to government subsidies,

some channels are supported by advertising, licensing fees and RDS paging services. The bulk of AIR news is derived from its own network of domestic correspondents. News and information also are broadcast internationally by the External Services Division.

India has two primary news agencies, the Press Trust of India Limited (PTI) and United News of India (UNI). PTI is a non-profit cooperative of Indian newspapers and provides service in English and Hindi. It has a network of 140 bureaus and more than 400 full-time journalists in India and stringers in more than 20 cities around the world. UNI is a private company with more than 100 bureaus in India and abroad and provides service in English, Hindi and Urdu. Both PTI and UNI provide coverage for television as well.

The Press Information Bureau (PIB) is the government agency responsible for disseminating information to the print and broadcast media on government policies and initiatives through its eight regional and 32 branch offices and the Internet. Materials are released in English, Hindi, Urdu and 13 regional languages and reach more than 8,000 newspapers and media organizations.

Performance of different types of newspapers

In 2002, out of 51,960 newspapers registered in India, only 5,055 submitted their annual return to the Registrar of Newspapers for India. Total circulation of newspapers based on data provided by only 4,780 newspapers was 115 million copies in 2002. The number of newspapers submitting their statistics for 2003 was 7,156 and their aggregate daily circulation was 142 million. The 703 newspapers which are members of the Indian Newspaper Society represented the circulation of 31 million in 2002 and 31.4 million in 2003.

Daily newspapers are published in almost all main languages but for Kashmiri. Kashmiri has only one newspaper, Chaman, which is a weekly. Uttar Pradesh, the country's most populous and politically vital state, publishes the largest number of dailies. In 2002, Hindi dailies top the list with 2,507 titles, followed by Urdu (534), English (407), Marathi (395), Tamil (366), Kannada (364), Malayalam (225), Telugu (180), Gujarati (159), Punjabi (107) and Bengali (103).

Most cities have more than one newspaper, and even provincial capitals can have up to eight morning dailies. The capital New Delhi has nine English dailies and five Hindi morning papers.

Readership

The readership base in India has grown from 163 million readers in 1999 to 180 million in 2002, registering a growth of 10%, according to the National Readership Survey (NRS) 2002. Of the 180 million readers, as many as 48% are from the nearly 600,000 villages scattered across the country. There is significant scope for growth in readership as 248 million adults are literate but do not read any publication.

The readership base for newspapers/dailies increased by nearly 20% in three years, from 131 million readers in 1999 to 156 million in 2002, substantially outpacing the literacy growth rate of 13% in the same period. Language dailies that contributed significantly to this growth included English (in



the metros), Hindi, Marathi and the clutch of newspapers from the south. The Assamese and Bengali dailies also sustained their pace. Newspapers have become cheaper than a bar of soap, a cigarette or a cup of coffee, enabling them to be accessed by many more people.

NRS 2003 included for the first time the younger age group of 12 to 15 years as this particular age group is increasingly influencing household purchase as indicated by various studies.

The Times of India has the largest circulation and it is also the top English publication (urban and rural) with readership of 7.235 million, according to the NRS 2003-04, Round 1. The second-highest-read English newspaper is Hindustan Times (2.947 million). The third is The Hindu (2.710 million), followed by Deccan Chronicle (1.053 million) and The Telegraph (1.023 million).

If only urban readership is taken into consideration, Dainik Jagaran and Dainik Bhaskar are the leading dailies with readership of 8.421 million and 7.993 million, respectively. The Times of India is the third-highest-read urban daily (6.876 million).

More urban housewives (21.7 million in 1999 and 25.4 million in 2002) read a daily newspaper, at the cost of magazines. The reach of magazines has declined from 93.8 million in 1999 to 86.2 million in 2002. Magazines have lost 22% of their reach since 1999 when taking into account the population growth over these years. The erosion is mainly in the general interest, film/entertainment and sports magazines, where the decline on an average is over 25%.

On average, an urban adult devoted 13 hours per week to traditional media (press, television and radio) in 2002, as compared to the 14 hours per week in 1999. In 2002, television use accounted for 72% of that time. The time spent on traditional media in villages is virtually half, that is, 6 hours per adult, per week, which has been constant since 1999. The decline in time spent on traditional media has not affected much reading time in urban India. In 2002, the average reader spent about 16% of his total media time, which was 18 minutes per day, in reading a daily or magazine.

Online/digital publishing

There has been a growth in adults accessing Internet from 1.4 million in 1999 to 6.02 million in 2002. This growth has mainly come from the top nine metros, where adults accessing Internet grew from 0.9 million to 2.9 million. As many as 20% of Internet users surf from home. As many as 43% go to a cyber cafe, compared to 0.1% in 1999. Access at work dropped from 45.8% to 23% during the same period.

Ownership

Out of 51,960 newspapers in 2002, 77% were owned by individuals, 10% by societies and associations, 5% by joint stock companies, 3% by firms and partnerships, and 1.5% by central and state governments. The rest was owned by trusts, cooperative societies, educational institutions and the like. Newspapers owned by individuals represented 46% of circulation, followed by those owned by joint stock companies (43%).

Since the government relaxed rules for foreign investment in the media, Hindustan Times Ltd, one of India's largest

newspaper publishing groups has offloaded a 20 per cent stake for US\$ 27.5 million to Henderson of the United Kingdom, a subsidiary of Australia's AMP.

Pearson Group, which owns Financial Times, has invested US\$ 3 million for a 13.85% stake in Business Standard, India's second largest financial daily.

US financial media group Dow Jones and Co. agreed to set up a joint venture to produce an Indian edition of the business daily *The Wall Street Journal*. Dow Jones struck the deal with Bennett, Coleman and Co., India's oldest and biggest media company, publisher of the Times of India and the Economic Times.

Media/press laws

In December 2002, parliament passed a Right to Information law. The change from the repressive regime of the Official Secrets Act, a legacy of the colonial rule in India, to the notion of freedom of information as a citizen's right has taken 77 years. This law allows citizens to request and receive documents from the government that are considered to be in the public domain.

The 1971 Newspapers Incitements to Offences Act remains in effect in Jammu and Kashmir. Under the act, a district magistrate may prohibit the press from publishing material likely to incite murder or any act of violence. As punishment the act stipulates that the authorities may seize newspaper premises and printing presses.

Printing

Approximately 50% of the newsprint demand in the country is met through imports.

Distribution

Publishers enter into agreements with distributors/wholesalers. The scope of the agreement usually covers the area of operation, the margins and the unsold return policies. However, agreements between distributor/wholesaler and retailers are unlikely.

The price is always maintained, since the cover price always appears on the publications. Discounts are generally maintained, with deviations occurring only in exceptional cases. In the last 15 years, prices of most items have doubled with inflation being 4-5% per annum. Newspaper prices, on the other hand, have fallen by one third. The vendor's margin per paper, however, remained static despite the rising costs.

Draws are usually decided by the distributors, based on market pointers, including returns, topics covered, promotions and incentives.

Distribution of local daily newspapers is an early morning activity. Based on sales potential, convenience of hawkers, a city has sub-centres. The hawkers who have standing orders from corporate houses and residences pick their requirements from such centres. Others who display and sell newspapers also pick their requirements from here.

India has two major importers of the international press, India Book Distributors (Bombay), Ltd. (IBD) and India Book House Limited (IBH). Both are also national distributors. Imports flow to wholesalers in major towns, and thence to the retailers. IBH as an example has assigned territories to its ten owned



sales offices, strategically located in major cities, each with their own warehousing.

Employment

The majority of journalists have a college education and most have a masters degree. Some even have doctoral degrees. A diploma in journalism is available at a number of institutions across India, including Usmania University, Calcutta University, New Delhi University, Chandigarh University

and the Institute of Mass Communications in New Delhi.

Sources: Registrar of Newspapers for India; Indian Readership Survey (IRS) 2002, 2003 and Round 1, 2003-04; Agencyfaqs.com; Indian Express; International Journalists' Network (IJNet); Newspaper Techniques; US State Department; IFEX; Distripress Gazette; The Economic Times Online; Commonwealth Press Union; PR Passport, a service of Crossover International Inc.

POPULATION

Adult population by age and sex

	All individuals		Male		Female	
	000	%	000	%	000	%
0-14	337,952	32	173,973	32	163,979	32
15-64	661,881	63	342,621	63	319,260	63
65+	49,867	5	25,282	5	24,585	5
Total	1,049,700	100	541,876	100	507,824	100

Source: CIA - The World Factbook 2003

Adult population by social class and sex

	All adults		Male		Female	
	000	%	000	%	000	%
A+B	50,475	7	27,336	8	23,139	7
C	40,390	6	21,672	6	18,718	6
D	42,689	6	22,665	6	20,024	6
E	54,936	8	28,057	8	26,879	8
R1	11,027	2	6,147	2	4,880	1
R2	32,667	5	17,425	5	15,242	5
R3	158,661	23	83,415	23	75,246	23
R4	294,832	43	151,082	42	143,750	44
Total	685,677	100	357,799	100	327,878	100

Source: IRS-2000 R1

Urban

A = high/intermediate managers/well educated/businessmen with large organisations

B = intermediate managers/good education/businessmen/self employed with small organisations

C = petty traders/shop owners/clerks/salesman/supervisors with some education

D = poorly educated petty traders/shopowners/clerks/salesman

E = skilled/unskilled workers

Rural

R1 = well educated, living in good houses

R2 = good education, living in not very good houses

R3 = some education, living in huts and temporary shelters

R4 = uneducated, living in temporary shelters

NUMBER OF TITLES AND CIRCULATION

	1999	2000	2001	2002	2003	Change (%)	
						98/2003	2002/03
Number of titles							
Registered titles (a)	46,665	49,145	-	51,960	55,780	19.53	7.35
Total dailies (a)	-	-	5,364	5,638	5,966	-	5.82
Total dailies (b)	392	398	393	402	412	5.10	2.49
Non-dailies (a) **	-	-	-	46,322	-	-	-
Non-dailies (b) ***	102	100	97	98	108	5.88	10.20
Sundays (b)	6	6	6	7	-	-	-
Circulation (000)							
Registered titles (a)	130,087	126,964	-	115,255	142,006	9.16	23.21
Total dailies (a)	-	-	59,129	57,844	72,939	-	26.10
Total dailies (b)	25,587	29,752	29,482	31,085	31,410	22.76	1.05
Non-dailies (a) **	-	-	-	57,410	-	-	-
Non-dailies (b) ***	7,594	8,085	8,317	8,591	8,707	14.66	1.35
Sundays (b)	146	155	160	-	-	-	-
Total annual sales (millions of copies)							
Dailies (b)	9,340	10,860	10,893	11,346	-	-	-
Non-dailies (b)	395	420	432	-	-	-	-
Sundays (b)	7.6	8.1	8.3	8.6	-	-	-

Sources: INS Annual Report 2002-03; Registrar of Newspapers for India

(a) All India; data by Registrar of Newspapers for India

(b) Only members of Indian Newspaper Society

* RNI data as of March 31, 2003; INS data as of June 30, 2003

** Tri/Bi-weeklies, weeklies, fortnightlies, monthlies, others

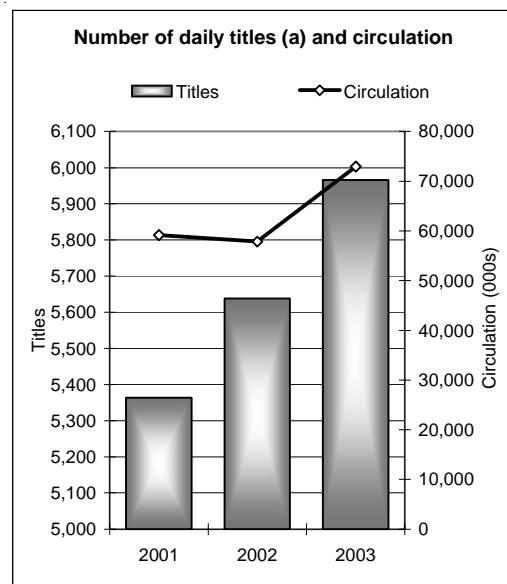
*** Weeklies only

MORE FACTS

Contribution of classified and display advertising to total advertising income (%)

	2001
Display	72
Classified	28

Source: INS Annual Report





	1999	2000	2001	2002	2003	Change (%)	
						98/2003	2002/03
Advertising revenues (Rupees million)							
Dailies	3,482	4,419	3,768	4,450	4,762 *	36.75	7.00
Dailies \$	3,906	4,765	3,919	4,450	4,578 *	17.20	2.88

Source: INS annual report

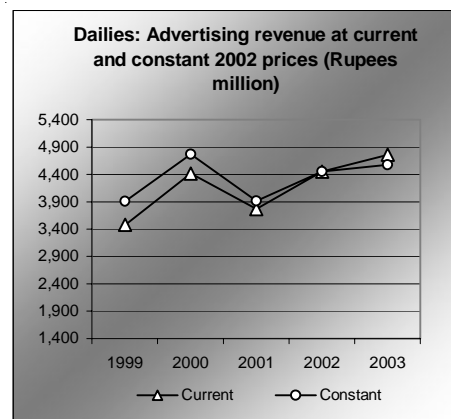
\$ at constant 2002 prices

* WAN/ZenithOptimedia estimate

Includes agency commission of 10%-15%

2001 had a classified revenue of 697.41 million rupees

Figures given above are before discount



Top dailies (2003)

Title	Publisher	Circulation* (000)	Readership** (000)	Cover Price		Format	Full page rate (Rp 000)	
				Rp	US\$		Mono***	Colour***
Dainik Bhaskar H	Bhaskar Prakashan Pvt. Ltd.	1,600	13,600	2.00/2.50	0.04-0.05	Broadsheet	1,404	2,808
Dainik Jagran H	Jagaran Prakashan	1,456	15,700	2.00/3.50	0.04-0.07	Broadsheet	1,198	1,760
The Times of India E	Bennett, Coleman & Co. Ltd.	1,284	7,235	1.50/3.00	0.03-0.06	Broadsheet	2,829	3,952
Malayala Manorama M	The Malayala Manorama Co. Ltd.	1,220	9,064	3.25/3.50	0.06-0.07	Broadsheet	998	1,997
Hindustan Times E	The Hindustan Times Ltd.	1,108	2,947	1.50/3.50	0.03-0.07	Broadsheet	1,364	1,540
Gujarat Samachar G	Lok Prakashan Ltd.	1,051	4,598	2.00/3.00	0.04-0.06	Broadsheet	804	1,296
The Hindu E	Kasturi & Sons Ltd.	933	2,710	3.00/4.00	0.06-0.08	Broadsheet	1,210	1,598
Eenadu TE	Ushodaya Entreprises Ltd.	920	8,145	2.80/3.50	0.05-0.07	Broadsheet	803	1,607
Ananda Bazar Patrika B	Abp Pvt. Ltd.	911	5,225	2.00/4.00	0.04-0.08	Broadsheet	791	1,581
Mathrubhumi M	Mathrubhumi	856	7,421	-	-	Broadsheet	790	1,581
AJ H	Jnanamandal Ltd.	854	2,973	1.50	0.03	Broadsheet	809	1,616
Punjab Kesari H	The Hind Samachar Ltd.	846	5,225	2.00/3.00	0.04-0.06	Broadsheet	447	676
Hindustan H	-	753	-	-	-	Broadsheet	691	821
Sandesh G	Sandesh Ltd.	743	-	-	-	Broadsheet	576	936
Daily Thanthi TA	-	687	8,871	-	-	Broadsheet	666	1,331
Rajasthan Patrika H	-	673	-	-	-	-	-	-
Daily Sakal MA	-	590	-	-	-	-	-	-
Dinamalar TA	-	558	-	-	-	-	-	-
Nava Bharat H	-	535	-	-	-	-	-	-
Bartaman B	-	464	-	-	-	-	-	-
The Economic Times E	-	442	-	-	-	-	-	-
Lokmat MA	-	417	-	-	-	-	-	-
Dainik Lokmat MA	-	413	-	-	-	-	-	-

Source: ABC Report/ZenithOptimedia; WAN from public sources

Language: Language: B = Bengali; E = English; G = Gujarati; H = Hindi; M = Malayalam; MA = Marathi; TA = Tamil; TE = Telugu

* ABC January - June 2003; excluding editions not certified by ABC

** Indian Readership Survey (IRS) Round 1, 2003-04

*** 2002

Top ten advertising categories (2001)

Advertising sector	Newspaper expenditure Rp (mill)
Corporate/brand image	1,908
Computer education	1,899
Two wheelers	1,842
Cars/jeeps	1,820
TV channel promotions	1,238
Property	1,143
Promotion	1,115
Durables range	875
Retail	800
Clothing	800

Source: ORG Map Press audit

Top ten publishing companies (2002)

(ranked by total circulation)
Bennett coleman & co. ltd.
Bhaskar prakashan pvt. ltd.
Jagaran prakashan
The malayala manorama co. ltd.
Lok prakashan ltd.
The hindustan times ltd.
Jnanamandal ltd.
Kasturi & sons ltd.
Abp pvt. ltd.
The hind samachar ltd.

Source: ABC report (Jan-June 2002)

Top ten advertisers (2001)

Advertiser	Newspaper expenditure Rp (mill)
Bajaj Auto	525
Hero Honda	530
Telco	498
Life Insurance Corp Of India	444
Hyundai	422
Samsung	382
LG Electronics	422
ITC	316
Maruti Udyog	389
NIIT	331

Source: ORG Map Press audit



ADVERTISING EXPENDITURE & ECONOMIC DATA

Main economic indicators 1996-2002

	1996	1997	1998	1999	2000	2001	2002
1 US\$=	48.61	Rupees at 2002 rate					
Gross Domestic Product (Rupees billion)							
at current prices	13,682	15,226	17,409	19,296	21,043	22,961	24,930
% change	15.2	11.3	14.3	10.8	9.1	9.1	8.6
at 2002 prices	19,490	20,244	20,448	21,649	22,690	23,879	24,930
% change	9.9	3.9	1.0	5.9	4.8	5.2	4.4
Gross Domestic Product per capita (Rupees 000)							
at current prices	14.6	15.9	17.9	19.6	21.0	22.6	24.5
at 2002 prices	20.7	21.2	21.1	21.9	22.6	23.5	24.5
Population							
Millions	939.5	955.2	970.9	986.6	1,002.1	1,017.5	1,017.5
Consumer Price Index							
2002=100	70.2	75.2	85.1	89.1	92.7	96.2	100.0
% change	9.0	7.1	13.2	4.7	4.0	3.7	4.0
Ad.spend as a % of GDP							
	0.35	0.37	0.31	0.31	0.34	0.36	0.36
Advertising Expenditure Growth (%)							
at current prices	20.9	19.0	-4.6	12.2	18.8	15.1	8.4
at 2002 prices	10.9	11.1	-15.7	7.2	14.2	11.0	4.2

Source: IFS, ZenithOptimedia

Advertising expenditure

(Rupees million, in current prices)

	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
Press	27,950	32,396	26,360	29,796	35,064	32,281	34,964	37,659	41,520	44,273	47,604
Television	15,520	19,724	21,358	23,765	28,098	33,400	37,408	41,897	46,087	50,695	61,772
Radio	1,100	1,119	998	1,470	1,800	2,250	2,588				
Cinema	100	104	217	245	350	310	600				
Outdoor	2,600	2,908	4,732	4,900	6,000	6,200	6,225				
Internet	0	0	0	50	250	350	350				
Total	47,270	56,251	53,665	60,226	71,562	82,367	89,295	97,415	105,398	113,621	128,811

Source: 1996-97 INS, Doordarshan, All India Radio, Star TV, Zee TV, Agencies, 1998-2001 ORG-MARG (TV and press), AIR (Radio), ZenithOptimedia, 2002-2006 ZenithOptimedia

Notes: Includes production costs, agency commission, and classified advertising, after discounts.

Ownership

Is there any law prohibiting or restricting foreign companies or individuals from owning shares, and in particular, the majority of shares, of domestic daily newspapers? In June 2002, India authorised foreign direct investment of up to 26% in news and current affairs related print media, breaking a decades-old ban stemming from concern over the impact on editorial policies. The government has put a similar cap of 26% on foreign investment in television news channels uplinking

inside the country. The 26% foreign investment limit for newspapers, magazines and television includes foreign direct investment as well as that by foreign institutional investors and Indians based overseas. The foreign direct investment cap for non-news and non-current affairs print media businesses was increased to 74%. Despite giving the green signal to foreign investment in the media, the government has stipulated that management control and editorial control of news publications have to remain in Indian hands.

POPULATION & MORE FACTS

Population by age and sex

	All individuals		Male		Female		Households 000
	000	%	000	%	000	%	
Children	61,795	28	31,643	29	30,152	27	55,652
16-24	43,977	20	22,417	20	21,560	19	
25-34	36,911	17	17,893	16	19,017	17	
35-44	30,812	14	14,836	13	15,977	14	
45-54	23,109	10	11,730	11	11,379	10	
55-64	13,776	6	6,970	6	6,806	6	
65+	11,908	5	5,344	5	6,564	6	
Total	222,287	100	110,832	100	111,454	100	

Source: Central Bureau of Statistics

Population by social class

	Adults 000
AB	5,388
C1	3,606
C2	2,195
D	1,808
E	406
Total	13,403

Source: Media Scene 2002-2003

Data for 7 big cities only: Jakarta, Bandung, Semarang, Surabaya, Ujung Pedang, Medan, Palembang

A= Upper middle class/higher managerial, administrative, professional

B= Middle class/intermediate managerial, administrative, professional

C1= Lower middle class/supervisory/clerical/junior managerial

C2= Skilled working class/skilled manual workers

D= Working class/semi and unskilled manual workers

E= Those at lowest levels of subsistence/state pensioners or widows

Newspaper reach (%)

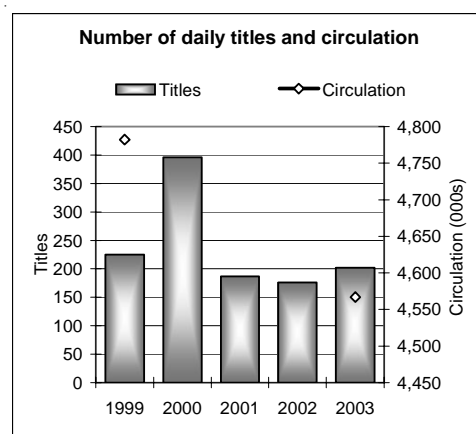
	Daily
All adults	40.9
Men	49.9
Women	31.9

Source: Media Scene 2002-2003

NUMBER OF TITLES AND CIRCULATION

	1999	2000	2001	2002	2003	Change (%)	
						99/2003	2002/03
Number of titles							
Total dailies	225	396	187	176	202	-10.22	14.77
National dailies	172	290	160	38	56	-67.44	47.37
Regional dailies	53	106	27	138	146	175.47	5.80
Total non-dailies	425	746	306	289	331	-22.12	14.53
National non-dailies	166	290	48	90	112	-32.53	24.44
Regional non-dailies	259	456	258	199	219	-15.44	10.05
Circulation (000)							
Total dailies	4,782	-	-	4,665	4,567	-4.50	-2.10
National dailies	2,292	-	-	-	2,622	14.39	-
Regional dailies	2,490	-	-	-	1,945	-21.89	-
Total non-dailies	7,758	-	-	5,608	5,617	-27.60	0.16
National non-dailies	5,270	-	-	-	3,714	-29.53	-
Regional non-dailies	2,488	-	-	-	1,903	-23.50	-
Total annual sales (millions of copies)							
Total dailies	1,720	-	-	1,679	1,644	-4.42	-2.08
National dailies	825	-	-	-	944	14.42	-
Regional dailies	895	-	-	-	700	-21.79	-
Total non-dailies	403	-	-	292	292	-27.54	0.00
National non-dailies	274	-	-	-	193	-29.56	-
Regional non-dailies	129	-	-	-	99	-23.26	-

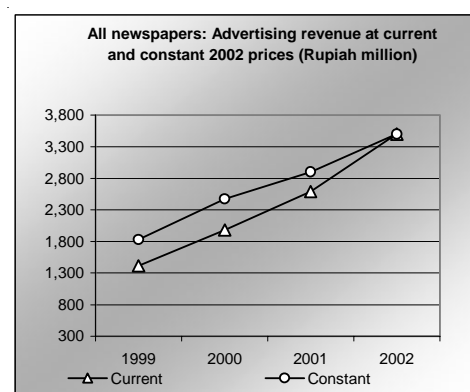
Source: Indonesian Newspaper Publishers Association



MORE FACTS

	1999	2000	2001	2002	2003	Change (%)	
						99/2002	2001/02
Advertising revenues (Rupiah billion)							
Dailies	1,415	1,982	2,593	3,502	-	147.46	35.08
Dailies \$	1,831	2,472	2,901	3,502	-	91.28	20.73
National dailies	512	809	1,036	1,380	-	169.36	33.19
Regional dailies	903	1,173	1,556	2,122	-	135.03	36.34
Non-dailies	98	140	184	237	-	141.32	28.40
National non-dailies	94	131	173	222	-	136.35	28.60
Regional non-dailies	4	9	12	15	-	253.59	25.55
Volume of advertising sold (pages & page equivalents, 000s)							
Total	30,727	-	-	-	-	-	-

\$ at constant 2002 prices





Contribution of classified, display and insert advertising to total advertising income (%)

	1997	1998	1999	2000	2001
Display	70	73	68	66	67
Classified	30	27	32	34	33

Newsprint costs

	1999	2000	2001	2002	2003
Newsprint costs (average per ton)					
Rupiah	3,430	6,100	5,380	4,350	4,750

Source: The Indonesian Newspaper Publishers Association

Cover prices

	Rp
Single copy	1,930

Newspaper formats

Number of:	1999	2000	2001	2002	2003
4-colour newspapers	650	1142	493	465	533
Broadsheets	225	396	187	176	202
Tabloids	425	746	306	289	331

Source: IPPN Department of Information, The Indonesian Newspaper Publishers Association

Top ten advertising categories (2003)

Advertising sector	% of display ad revenue
Banking/finance	6.9
Private cars	6.3
Motorcycle, scooters & bikes	6.0
Telecommunications	5.7
Corporate ads & social services	5.4
Media, ad agencies & production	5.3
Education	4.1
Travel, tourism & entertainment	3.6
Hotels/bars/restaurants/discos/cinemas	3.6
Property	2.9

Source: AC Nielsen - AEM, Media Scene

Top ten publishing companies (2003)

	Circulation	Revenue (Rp billion)
Kompas	506,000	1,214
Jawa Pos	433,383	866
Media Indonesia	284,745	569
Suara Pembaruan	200,000	380
Republika	200,000	400
Pos Kota	200,000	200
Koran Tempo	200,000	460
Pikiran Rakyat	182,994	311
Suara Merdeka	176,000	440
Kedaulatan Rakyat	159,095	238

Source: AC Nielsen - AEM, Media Scene

Top ten advertisers (2003)

Advertiser	Newspaper expenditure Rp (Mill)
Nokia	30,144
Matahari	24,465
Yamaha	22,609
Suzuki	22,465
Partyline	19,468
Honda	19,414
Suzuki Shogun	18,391
Samsung	17,697
Sony Ericsson	16,895
Mitsubishi Kuda	15,316

Source: AC Nielsen - AEM, Media Scene

Top ten dailies (2003)

Title	Publisher	Circulation (000)	Readership %	Cover Price		Format	Full page rate (Rp 000)	
				Rp	US\$		Mono	Colour
Kompas	Jakob Oetama	506	7.4	2,400	0.26	Broadsheet	40,000	45,000
Jawa Pos	Dahlan Iskan	433	4.4	2,000	0.21	Broadsheet	15,000	21,000
Media Indonesia	Surya Paloh	284	3.5	2,000	0.21	Broadsheet	21,000	29,000
Suara Pembaruan	Sasongko Soedaryo	200	-	1,900	0.20	Broadsheet	19,000	25,000
Republika	Erick Tohir	200	0.8	2,000	0.21	Broadsheet	14,000	20,000
Pos Kota	H. Tahar	200	6.7	1,000	0.11	Broadsheet	15,000	21,000
Koran Tempo	Bambang Harimurti	200	0.8	2,300	0.25	Broadsheet	-	35,000
Pikiran Rakyat	H. Syafik Umar	182	2.2	1,700	0.18	Broadsheet	12,500	22,500
Suara Merdeka	Budi Santoso	176	1.1	2,500	0.27	Broadsheet	18,000	27,500
Kedaulatan Rakyat	Soemadi M. Wonohito	159	-	1,500	0.16	Broadsheet	11,000	22,500

Source: The Indonesian Newspaper Publishers Association, Media Scene 2002-2003

Online readership

Main newspaper sites

Kompas	www.kompas.com
Koran Tempo	www.korantempo.com
Republika	www.republika.com
Bisnis Indonesia	www.bisnis.com

Source: The Indonesian Newspaper Publishers Association

Internet publishing (No. of online editions)

	2001	2002	2003
Dailies	24	24	28
Non-dailies	26	26	31
Sundays		67	74

Employment

	1999	2000	2001	2002	2003
Total no. of journalists	10,839	12,951	15,081	17,211	19,341
Total no. of employees	19,506	23,366	27,526	31,666	35,846

Source: IPPN Dept of Information



ADVERTISING EXPENDITURE & ECONOMIC DATA

Main economic indicators 1996-2002

	1996	1997	1998	1999	2000	2001	2002
1 US\$=	9,311	Rupiah at 2002 rate					
Gross Domestic Product (Rupiah trillion)							
at current prices	533	628	956	1,100	1,282	1,491	1,730
% change	17.2	17.9	52.3	15.1	16.6	16.3	16.0
at 2002 prices	1,396	1,543	1,489	1,423	1,599	1,668	1,730
% change	8.5	10.5	-3.5	-4.5	12.4	4.3	3.7
Gross Domestic Product per capita (Rupiah 000)							
at current prices	2,706	3,141	4,675	5,301	6,091	6,940	8,053
at 2002 prices	7,094	7,720	7,286	6,859	7,599	7,765	8,053
Population							
Millions	196.8	199.9	204.4	207.4	210.5	214.8	214.8
Consumer Price Index							
2002=100	38.1	40.7	64.2	77.3	80.2	89.4	100.0
% change	8.0	6.6	57.7	20.5	3.7	11.5	11.9
Ad.spend as a % of GDP							
	0.78	0.81	0.39	0.51	0.62	0.66	0.77
Advertising Expenditure Growth (%)							
at current prices	24.1	23.0	-26.2	49.3	40.7	24.1	35.7
at 2002 prices	14.9	15.4	-53.2	23.9	35.6	11.3	21.3

Source: IFS, ZenithOptimedia

Advertising expenditure

(Rupiah million, in current prices)

	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
Newspapers	1,202,000	1,540,000	956,000	1,415,000	1,982,000	2,593,000	3,502,000	4,378,000	5,704,534	3,502,000	9,685,209
Magazines	270,000	311,000	191,000	292,000	448,000	614,000	768,000	992,000	1,293,866	1,687,589	2,201,122
Television	2,203,000	2,678,000	2,213,000	3,445,000	4,933,000	6,057,000	8,383,000				
Radio	189,000	206,000	136,000	187,000	257,000	329,000	413,000				
Cinema	10,000	9,000	4,000	6,000	8,000	9,000	9,000				
Outdoor	266,000	350,000	261,000	269,000	269,000	202,000	232,000				
Internet	0	0	500	500	835	1,000	2,000				
Total	4,140,000	5,094,000	3,761,500	5,614,500	7,897,835	9,805,000	13,309,000	16,953,000	22,007,111	28,571,443	37,098,193

Source: 1996 SRI, 1997-2002 Nielsen/IAAA, 2003-2006 ZenithOptimedia

Notes: Excludes agency commission, classified advertising, and production costs. Before discounts (typically 75% in TV)

Research

Circulation is audited by: SGV Oetomo

Readership is measured by: Survey Research Indonesia

Taxes

VAT on: sales 10% advertising 10%
 newsprint 10% plant 10%
 composition 10% (standard VAT rate 10%)

Discounts

on: post 0 rail 0 telephone 0 telegraph 0 telex 0

Other reductions: There is a 25% discount on airline travel with Garuda Indonesia Airways and Merpati Nusantara. Magazines also receive the discount but only for travel to the following eight cities: Medan, Palembang, Semarang, Solo, Yogyakarta, Surabaya, Denpasar and Ujung Pandang.

IRAN

General economic situation

GDP total US\$458.3 billion; GDP per capita US\$6,712 (purchasing power parity; 2002). Consumer price index 115.3 (2002).

Performance of newspapers vs. other media

More than 80% of the population watch TV. The government directly controlled and maintained a monopoly over all television and radio broadcasting facilities; programming reflected the government's political and socio-religious ideology. Radio and television served as the principal news source for many citizens. Satellite dishes that received foreign television broadcasts were forbidden; however, many citizens, particularly the wealthy, owned them. The government confiscated many satellite dishes in the wake of the October 2001 soccer riots and during periodic crackdowns throughout the year.

Performance of different types of newspapers

Newspapers and magazines represented a wide variety of political and social perspectives, some allied with members of the government.

Newspaper launches/closures

More than 80 publications have been shut down in the country since a crackdown on the independent press began in April 2000. In 2002, *Norooz* (New Year), the leading reformist newspaper in the country, was banned for six months. *Rouz-e-No*, which was to be its continuation, was barred by the Press Court. The following newspapers were also closed, banned or suspended: *Golestan-e-Iran*, which had been publishing for approximately one month; *Vaqt*; *Nosazi*; *Azad*; *Bonyan*; *Ayineh-e-Jonoubi*; and the financial daily *Akhbar-e-Eghtessadi*.

Circulation

Newspapers and other print media had a limited circulation outside large cities.

Media/press laws

The Constitution provides for freedom of the press, except when published ideas are "contrary to Islamic principles, or are detrimental to public rights." The government restricted

freedom of speech and of the press in practice. Many subjects of discussion were tolerated, including criticism of certain government policies. However, the 1995 Press Law prohibits the publishing of a broad and ill-defined category of subjects, including material "insulting Islam and its sanctities" or "promoting subjects that might damage the foundation of the Islamic Republic." Prohibited topics include fault-finding comments regarding the personality and achievements of the late Leader of the Revolution, Ayatollah Khomeini; direct criticism of the Supreme Leader; assailing the principle of velayat-e faqih, or rule by a supreme religious leader; questioning the tenets of certain Islamic legal principles; publishing sensitive or classified material affecting national security; promotion of the views of certain dissident clerics, including Grand Ayatollah Ali Montazeri; and advocating rights or autonomy for ethnic minorities.

The 1995 Press Law established the Press Supervisory Board, which is composed of the Minister of Islamic Culture and Guidance, a Supreme Court judge, a Member of Parliament, and a university professor appointed by the Minister of Islamic Culture and Guidance. The Board is responsible for issuing press licenses and for examining complaints filed against publications or individual journalists, editors, or publishers. In certain cases, the Press Supervisory Board may refer complaints to the courts for further action, including closure.

Sources: CIA - The World Factbook 2003; Freedom House; US State Department; BBC; WAN from public sources

POPULATION

Population by age and sex

	All individuals		Male		Female	
	000	%	000	%	000	%
0-14	20,008	29	10,280	30	9,728	29
15-64	45,011	66	22,916	66	22,095	66
65+	3,260	5	1,625	5	1,635	5
Total	68,279	100	34,821	100	33,458	100

Source: CIA - The World Factbook 2003

IRAQ

General economic situation

GDP total US\$58 billion; GDP per capita US\$2,350 (purchasing power parity; 2002). Consumer price index 170 (2002).

Performance of newspapers vs. other media

Iraq's media have gone through a huge transformation since April 9, 2003. The state television went off the air before US troops entered Baghdad, along with Iraqi satellite television and Youth Television run by Saddam's eldest son Uday. Newspapers and radio stations propped up by the regime have also shut down. The Iraqi Media Network, under a contract from a US company Science, Application International Corporation, had set up a local television station, radio and a newspaper. Iraqis of sufficient means now get their news from foreign sources, particularly Al-Alam, an Arabic-language

satellite network run by the Iranian government, and Toward Freedom, run by US forces. Iraqis say they are mainly watching the Arabic language networks like Al Jazeera.

Performance of different types of newspapers

More than 100 newspapers are being published. The most credible newspaper in Baghdad, according to The International Herald Tribune, is *Azzaman*, with a circulation of 75,000, published by a former Saddam aide who escaped in 1992.

Newspaper launches/closures

Al-Hayat, the respected Arabic-language daily published in London, hit the streets of Baghdad in 2003, but at one dollar an issue it is a luxury item for most Iraqis. The new sports weekly *Al-Ittihad Ar-Riyadhi* hit Baghdad newsstands in May 2003.



Al Mustaqilla (The Independent) newspaper has been shut down for advocating 'death to all spies and those who cooperate with the U.S.'

Media/Press Laws

In June 2003, the Coalition Provisional Authority ordered media to stop using language that would incite 'violence and terrorism.'

At a conference held in Athens in June 2003, more than 75 experts from 15 countries adopted a document that attempts to bring order to the chaotic development in the media sector. This would largely be accomplished by an Interim Media

Commission, a development authority.

Employment

More than 5,000 staff who used to run Iraqi media organisations, including state television and radio, were sacked in 2003 when the information ministry was abolished. Senior officials and Baath Party members employed by the ministry will not be eligible for hire by the Iraqi Media Network, set up soon after US troops toppled Saddam.

Sources: CIA – *The World Factbook 2003*; AFP; Reuters; *The Guardian*; *The International Herald Tribune*; CNN

POPULATION & MORE FACTS

Population by age and sex

	All individuals		Male		Female	
	000	%	000	%	000	%
0-14	10,050	41	5,104	41	4,946	41
15-64	13,889	56	7,033	56	6,856	56
65+	744	3	349	3	395	3
Total	24,683	100	12,486	100	12,197	100

Source: CIA - *The World Factbook 2003*

Top dailies (2002)

Title	Language
Al-Awqat (The Times)	(in Arabic)
Azzaman (Time)	(in Arabic)
Brayati	(in Kurdish)
Al-Iraq Al-Jadid (New Iraq)	(in Arabic)
Kurdistan Nuwe	(in Kurdish)
Al-Manar (The Lighthouse)	(in Arabic)
Nida al-Mustaqbal (Call of the Future)	(in Arabic)
Al-Taakhi (Fraternity)	(in Kurdish and Arabic)

Source: WAN from public sources

Commentary – Cullen Communications

The Irish economy appears to have come through the global slowdown remarkably well and is already showing signs of responding to improved international conditions.

Irish statistics are complicated by the scale of operations of foreign (mostly American) companies in high-value sectors such as computers and pharmaceuticals. In terms of output (GDP), last year would appear to have been the bottom of the downturn. But for Irish national income (GNP) the weakest year was 2002, when income showed no growth as Irish companies suffered overseas.

Certainly, 2001, 2002 and 2003 were three years when growth was below the economy's potential. However, that potential has fallen since the "Celtic Tiger" days of the 1990s, when a rapidly-expanding labour force helped fuel growth of around 8% a year.

Most economists think normal growth is now in the 4%-5% range, which would still leave Ireland as the fastest-growing economy in the existing EU of 12 states. Provisional estimates from the Central Statistics Office suggest GNP grew by 3.3% in 2003. Most forecasters think the economy will expand by close to 4% in 2004, and improve further in 2005.

Both exports and personal consumption are expected to contribute to faster growth. There were problems with trade statistics last year and, allowing for this, exports probably fell slightly. Lower international prices meant the fall in value was more like 5%. But exports were already improving in the second half of the year and should expand by up to 4% in 2004.

Consumption growth has been modest by the standards of the 1990s, but remains positive, with annual increases of just under 3% in real terms. As the international climate improves, and job uncertainty diminishes, personal consumption should also return to trend growth of 4% a year.

The jobs market has been encouragingly robust in recent years. The unemployment rate is still less than 5%, although it may continue to tick up this year as companies make more use of existing workers. A sharp fall in industrial jobs has been masked by continued hiring in the public sector, jobs growth in services and an increase in part-time working. But it is a healthy position going into the expected recovery.

The most remarkable performance of all is that of the housing market. Not only did prices increase by 12% last year, the volume of house-building increased by 20%. Some economists are worried that houses are over-priced. But, with interest rates likely to fall again, and employment prospects improving, prices will probably continue to rise.

The chance of a house-price crash may be the biggest medium-term risk to the economy. For 2004, the only risk would seem to be that the international recovery will peter out. As always, Ireland is more dependent on what happens abroad, especially in the USA, than what happens at home.

Circulation

Overall, the circulation of Irish dailies declined by 6% in 2003, but the circulation of Irish Sundays increased by 12%.

Readership

The JNRS report for 2003 shows that more than nine out of 10 adults read newspapers in a typical week. Furthermore, daily newspapers picked up 37,000 new readers in the last six months of the year, while Sunday newspapers attracted 38,000 new readers in the same period.

The increase in newspaper readership is largely attributable to women: the 'gender gap' has almost completely disappeared, with 90% of women now reading newspapers (compared to 91.5% of men).

Advertising

€253 million of advertising revenue was recorded in NNI titles during 2003, which accounts for more than half the total national advertising expenditure across all media. Advertising revenues grew by nearly 10% in the NNI's 12 member titles in the final quarter of the year.

Direct advertising revenue – at €121 million – almost equalled ad agency revenue – at €132 million – reflecting improved economic buoyancy, particularly in property and retail as well as improved spend in financial, motors, recruitment and general classified.

Newspaper launches & acquisitions

Independent Star Limited launched the *Irish Daily Star Sunday* in October 2003. The circulation for the first month was quite strong at 102,082; in November it was 76,191 and by December it had fallen to 60,220.

Thomas Crosbie Holdings bought the *Irish Post* in the UK.

Recent launches:

Ireland on Sunday launched *TV Week*, a full-colour TV listings magazine.

The *Evening Herald* launched *It's Friday*, a full-colour entertainment guide.

Irish Daily Star Sunday launched *Your Life*, a full-colour features magazine.

Sunday World launched the *Sunday World Magazine*, a full-colour features magazine

Sunday Tribune launched *I Magazine*, a full-colour features & TV Guide

Sunday Independent launched *Life*, a full-colour features magazine

VAT

VAT on newspapers still stands at 13.5%, the highest in Europe.

Environment

An industry-formed working party is working, in consultation with the Department of the Environment, to find a solution to divert all retail unsolds away from landfill and into the recycling chain.

Press freedom

In March 2003, the Legal Advisory Group on Defamation published a report into Defamation Law reform and they recommended the establishment of a statutory press council.

The industry welcomed most of the recommendations of defamation law reform but was against the concept of a statutory press council.



The industry came together to form a Steering Committee, with members drawn from NNI, RNAI, PPAI, NUJ and the Irish editions of UK newspapers. We are in the process of establishing an Independent Press Council, based on the long-standing Swedish model. It will not be statutory or self-regulation but independent regulation.

The Steering Committee, chaired by Thomas N Mitchell, must agree structure, a Code of Press Standards, funding and an independent method of appointments.

The industry is confident that by the end of 2004 the Office of Press Ombudsman will be established.

WAN

The World Association of Newspapers had its 56th World

Newspaper Congress, 10th World Editors Forum and Info Services Expo 2003 in the RDS in June 2003.

Almost 1,300 delegates attended what is the annual biggest newspaper event. 'Dublin 2003' turned out to be the most profitable Congress ever and most successful in terms of sponsorship. €6-€7 million was generated for the economy.

The Taoiseach, Mr Bertie Ahern T.D.; the President, Mrs Mary McAleese; Bono; The Corrs and Riverdance welcomed the delegates to Ireland.

The speakers included Lord Conrad Black, Robert Fisk, Gloria Brown Anderson (*The New York Times*) and Mathias Döpfner (Axel Springer).

MORE FACTS

Population by age and sex

	All individuals		Male		Female		Households 000
	000	%	000	%	000	%	
0-14	827	21	424	22	403	20	1,288
15-24	642	16	326	17	316	16	
25-34	617	16	308	16	309	16	
35-44	563	14	280	14	283	14	
45-54	480	12	242	12	239	12	
55-64	352	9	177	9	174	9	
65+	436	11	189	10	247	13	
Total	3,917	100	1,946	100	1,971	100	

Source: Central Statistics Office, Census 2002

Housewives

	Housewives	
	000	%
Under 25	68	6
25-34	263	22
35-44	259	21
45-54	230	19
55-64	173	14
65+	222	18
Total	1,215	100

Source: Joint National Readership Research Survey 2003, Lansdowne Market Research

Population by social class and sex

	All adults 15+		Male		Female	
	000	%	000	%	000	%
A+B	406	13	207	13	199	13
C1	812	26	380	25	432	27
C2	718	23	402	26	316	20
D	516	17	243	16	273	17
E	343	11	123	8	220	14
F	328	11	183	12	145	9
Total	3,123	100	1,538	100	1,585	100

Source: Joint National Readership Research Survey 2003, Lansdowne Market Research

A = upper class/higher managerial, administrative, professional
 B = middle class/intermediate managerial, administrative, professional
 C1 = lower middle class/supervisory/clerical/junior managerial
 C2 = skilled working class/skilled manual workers
 D = working class/semi and unskilled manual workers
 E = subsistence/state pensioners/widows/inactive
 F = farmers

Households

Occupancy	Households	
	000	%
1 person	278	22
2 people	334	26
3 people	228	18
4 people	233	18
5 or more people	216	17
without children	877	68
with children	411	32
with oldest child aged 0-3	191	15
with oldest child aged 4-9	112	9
with oldest child aged 10-14	108	8
Total	1,288	100

Source: Central Statistics Office, Census 2002

Age structure of adult readership

Age	% of readership	% weekly reach within age group
15-18	7.4	85
19-24	13.0	91
25-34	20.6	91
35-44	17.4	91
45-54	15.9	93
55-64	12.0	93
65+	13.8	89

Source: JNRS

Newspaper reach (%)

	Weekly
All adults	90.8
Men	91.5
Women	90.0
MHS	90.1

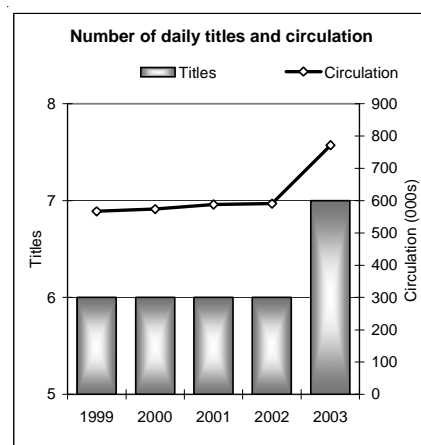
Source: JNRS

MHS: Main Household Shopper



NUMBER OF TITLES AND CIRCULATION

	1999	2000	2001	2002	2003	Change (%)	
						99/2003	2002/03
Number of titles							
Total dailies	6	6	6	6	7	16.67	16.67
<i>Irish dailies</i>	6	6	6	6	5	-16.67	-16.67
<i>Irish editions of UK dailies</i>	-	-	-	-	2	-	-
Non-dailies	61	61	-	-	53	-13.11	-
<i>National non-dailies</i>	1	1	-	-	2	100.00	-
<i>Regional non-dailies</i>	60	60	-	98	51	-15.00	-47.96
Sundays	5	5	5	6	10	100.00	66.67
<i>Irish Sundays</i>	5	5	5	6	6	20.00	0.00
<i>Irish editions of UK Sundays</i>	-	-	-	-	4	-	-
Circulation (000)							
Total dailies	567	574	588	591	772	36.16	30.63
<i>Irish dailies</i>	567	574	588	591	545	-3.88	-7.78
<i>Irish editions of UK dailies</i>	-	-	-	-	227	-	-
Non-dailies	1,372	1,354	-	1,400	887	-35.35	-36.64
<i>National non-dailies</i>	72	72	-	-	131	81.94	-
<i>Regional non-dailies</i>	1,300	1,282	-	1,400	756	-41.85	-46.00
Sundays	827	826	809	848	1,369	65.56	61.44
<i>Irish Sundays</i>	827	826	809	848	952	15.13	12.26
<i>Irish editions of UK Sundays</i>	-	-	-	-	417	-	-
Total annual sales (millions of copies)							
Total dailies	177	179	183	184	236	33.33	28.26
<i>Irish dailies</i>	177	179	183	184	165	-6.78	-10.33
<i>Irish editions of UK dailies</i>	-	-	-	-	71	-	-
Non-dailies	67	67	-	-	46	-31.34	-
<i>National non-dailies</i>	-	-	-	-	7	-	-
<i>Regional non-dailies</i>	-	-	-	-	39	-	-
Sundays	43	39	42	44	72	67.44	63.64
<i>Irish Sundays</i>	43	39	42	44	50	16.28	13.64
<i>Irish editions of UK Sundays</i>	-	-	-	-	22	-	-



MORE FACTS

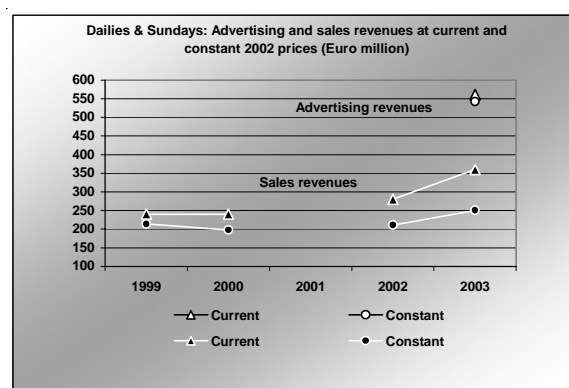
	1999	2000	2001	2002	2003	Change (%)	
						99/2003	2002/03
Advertising revenues (Euro million)							
Dailies	-	-	-	-	561	-	-
Dailies §	-	-	-	-	542	-	-
<i>National dailies</i>	-	-	-	-	418	-	-
<i>Regional dailies</i>	-	-	-	-	143	-	-
Non-dailies	-	-	-	-	26	-	-
Sundays	-	-	-	-	142	-	-
Sales revenues (Euro million)							
Dailies	184	180	-	211	259	40.68	22.75
Dailies §	213	198	-	211	250	17.25	18.60
Non-dailies	42	-	-	-	10	-76.13	-
Sundays	56	60	-	69	101	80.78	46.38

Source: NNI/API

§ at constant 2002 prices

* excludes Sundays

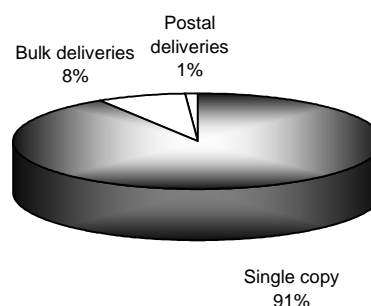
Ad revenues are before discounts



Type of newspaper sales (%)

	Single copy	Bulk deliveries	Postal deliveries
1998	99	-	1
1999	99	-	1
2000	99	-	1
2001	-	-	-
2002	99	-	1
2003	91	8	1

Type of newspaper sales in 2003 (%)





Distribution and newsprint costs

	1999	2000	2001	2002	2003
As % of average cover price					
Single copy sales	29	29	-	29	29
Home deliveries	-	-	-	-	-
Postal deliveries	-	-	-	-	< 1

Source: Eason Wholesale News

Contribution of classified and display advertising to total advertising income (%)

	1999	2000	2001	2002	2003
Display	57	60	-	56	52
Classified	43	40	-	45	48

Top dailies (2003)

Title	Publisher	Circulation (000)	Readership (000)	Cover Price		Format	Full page rate (€)	
				€	US\$		Mono	Colour
Irish Independent	Independent Newspapers Ireland Limited	161	532	1.50	1.41	Broadsheet	24,200	30,400
The Irish Times	The Irish Times Limited	116	319	1.50	1.41	Broadsheet	22,985	25,115
Irish Daily Sun	News International	116	286	0.63	0.59	Tabloid	7,600	10,150
The Irish Daily Star	Independent Star Limited	110	437	1.20	1.13	Tabloid	12,460	16,890
Irish Daily Mirror	Trinity Mirror	80	218	0.80	0.75	Tabloid	4,695	7,223
Irish Examiner	Thomas Crosbie Holdings	59	206	1.45	1.36	Broadsheet	13,650	16,380

Top advertising categories (2003)

Advertising sector	Newspaper expenditure €
Auctioneers	81,613,481
Electrical	25,960,649
Display appointments	20,711,055
Supermarkets	19,290,085
Auto	14,654,360
Concerts/festivals	14,274,331
Phone ringtones/logos/downloads	11,492,308
Department stores	8,834,086
Car dealers	8,297,889
Household	8,265,674

Source: IAPI

Top publishing companies (2003)

	Total annual sales
Independent Newspapers Ireland Limited	94,495,908
News International	50,059,516
The Irish Times Limited	36,358,608
Independent Star Limited	35,164,340
Trinity Mirror Group	29,976,908
Examiner Publications Limited	21,280,272
Sunday Newspapers Limited	14,667,016
Associated Newspapers Ireland Limited	8,540,740
Tribune Publications Limited	4,252,040
The Agricultural Trust	3,593,096

Source: ABC

Top ten advertisers (2003)

Advertiser	Newspaper expenditure €
Government departments	30,685,322
Diageo	18,005,604
Proctor & Gamble	14,507,237
Vodafone (Eircell)	13,299,673
MCD.IE	10,656,300
Tesco	9,762,685
Sherry Fitzgerald	8,875,268
O2	8,518,179
Coca-Cola	8,332,378
Dunnes Stores	8,240,473

Source: IAPI

Internet publishing (No. of online editions)

	1999	2000	2001	2002	2003
Dailies	3	3	-	3	3
Sundays	-	-	-	1	1

Online readership (monthly page impressions, million)

Newspaper	1999	2000	2001	2002	2003
The Irish Times	10.2	17.8	-	25.5	14.5
Irish Independent	1.4	3.4	-	10.7	11.0
Irish Examiner	3.4	2.5	-	6.9	4.5
The Sunday Business Post	-	-	-	0.8	0.9

Source: NNI

Newspaper colour capability & formats

Number of:	1999	2000	2001	2002	2003
4-colour newspapers	4	4	-	4	18
Broadsheets	3	3	-	3	7
Tabloids	3	3	-	3	11

Source: NNI

Note: Irish national dailies only before 2003

Cover prices

	€
Single copy	1.00-1.80

Media consumption

(all adults - minutes per day)

	2000	2001	2002
Newspapers	40	-	40
TV	199	-	199
Radio	305	-	305
Internet	23	-	23



CROSS MEDIA OWNERSHIP

Owners	National TV	Regional Newspapers	National Newspapers	Radio
National TV Licensees	Only one private licence	No	No	State broadcaster only
Regional Newspaper Owners	Only one private licence; limited investment allowed	-	No limit	Up to 25% of maximum 2 licences
National Newspaper Owners	Only one private licence; limited investment allowed	Subject to ministerial approval	Subject to ministerial approval	Subject to IRTC approval
Satellite TV Broadcasters	No cases to date. Subject to IRTC and ministerial approval	Subject to ministerial approval	Subject to ministerial approval	No cases to date. Subject to IRTC and ministerial approval
Local Radio Licensees	No cases to date. Subject to IRTC approval	No cases to date. Subject to IRTC approval	No cases to date. Subject to IRTC approval	-
National Radio Licensees	State only	No cases to date. Subject to ministerial approval	No cases to date. Subject to ministerial approval	State and independents restricted to one local licence
Foreign Investors	One case to date. Yes, but subject to IRTC approval	Yes, but subject to ministerial approval	Yes, but subject to ministerial approval	Yes, but subject to IRTC approval

IRTC = Independent Radio and TV commission

Ministerial = Minister for Enterprise, Trade and Employment

ADVERTISING EXPENDITURE & ECONOMIC DATA

Main economic indicators 1996-2002

	1996	1997	1998	1999	2000	2001	2002
1 US\$=	1.06						
	Euro at 2002 rate						
Gross Domestic Product (Euro billion)							
at current prices	58	67	79	90	103	114	130
% change	10.2	15.6	18.6	13.0	14.6	11.2	13.3
at 2002 prices	71	81	94	104	113	120	130
% change	8.4	14.0	15.8	11.1	8.6	6.1	8.2
Gross Domestic Product per capita (Euro 000)							
at current prices	16.0	18.3	21.5	23.9	27.2	29.8	33.8
at 2002 prices	19.5	22.1	25.3	27.8	29.8	31.2	33.8
Population							
Millions	3.6	3.7	3.7	3.8	3.8	3.8	3.8
Consumer Price Index							
2002=100	81.7	82.9	84.9	86.3	91.1	95.5	100.0
% change	1.7	1.5	2.4	1.7	5.6	4.9	4.7
Ad.spend as a % of GDP							
	0.66	0.67	0.63	0.63	0.76	0.76	0.80
Advertising Expenditure Growth (%)							
at current prices	10.7	18.7	10.8	13.7	36.6	12.5	18.5
at 2002 prices	8.9	17.0	8.2	11.8	29.4	7.3	13.2

Source: IFS, ZenithOptimedia

Advertising expenditure

(Euro million, in current prices)

	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
Newspapers	178	235	247	274	431	495	628	632	645	677	704
Magazines	18	17	17	20	15	17	24	28	30	31	32
Television	122	130	149	173	200	197	207				
Radio	34	37	44	49	55	70	65				
Cinema	4	4	5	5	6	7	9				
Outdoor	25	30	39	48	70	86	98				
Internet	0	0	0	0	2	3	6				
Total	381	452	501	569	778	875	1,037	1,050	1,086	1,125	1,177

Source: 1996-2002 Advertising Statistics of Ireland, 2003-2006 ZenithOptimedia

Notes: Excludes production costs and classified advertising, includes agency commission of 15%, before discounts

**Research**

Circulation is audited by: The Audit Bureau of Circulation (ABC)

Readership is measured by: Lansdowne Market Research, The Joint National Readership Research (JNRR)

Methodology: Random probability survey based on a sample of 7,000, using a moving annual total, published twice yearly. Interviewers choose interviewees from the census and then visit them at their home address.

Taxes

VAT on:	sales 13.5%	advertising 21%
	newsprint 21%	plant 21%
	composition 21%	(standard VAT rate 21%)

Newspaper publishers are taxed at 12.5% on profits.

Discounts

on: post 0 rail 0 telephone 0 telegraph 0 telex 0

As of 11 Jan 2000, postal rates for newspapers were increased dramatically. Where previously a set newspaper postage rate was in place, irrespective of weight and at a reduced level, the new rate is by weight bands with increases in some cases of nearly 200% for overseas postage

Ownership

Does any law exist governing publishing-house ownership, or the registration of shares in newspaper-publishing companies? No

Is there any law prohibiting or restricting foreign companies or individuals from owning shares, and in particular, the majority of shares, of domestic daily newspapers? No

Is there any law prohibiting daily newspaper or periodical publishers from operating radio or television stations in the same locality? No

So as to guarantee disclosure and transparency in the capital structure and to avert silent partnerships, is there a law or rule making it possible to determine who actually owns a publishing company? The Companies Act requires all companies to disclose the names of their shareholders.

Is there an antitrust law limiting concentration in the daily press? There is no specific limit, but the Minister for Enterprise and Employment has the power to refer any proposed takeover, merger or investment to the Competitions Authority to determine whether such an action would lead to a distortion in trade or lessening of commercial competition.

Is further regulation of media concentration expected? No

POPULATION

Population by age and sex

	All individuals		Male		Female	
	000	%	000	%	000	%
0-15	1,978	30	1,014	31	964	29
16-24	990	15	504	16	485	15
25-34	987	15	496	15	491	15
35-44	776	12	380	12	395	12
45-54	730	11	352	11	378	11
55-64	463	7	220	7	243	7
65+	647	10	275	8	372	11
Total	6,570	100	3,242	100	3,328	100

Source: Statistical Abstract of Israel 2003, Central Bureau of Statistics, 2.18, 2-58

Age structure of readership

Age	% of readership	% daily reach within age group
18-24	15.8	60.1
25-34	17.6	54.2
35-44	16.7	59.8
45-54	20.0	71.4
55-64	12.3	74.2
65+	17.6	68.5

Source: Single Source Research via TGI Survey. 10,000 adult 18+ sample published twice yearly on a rolling 6 month sample (January-December 2003); Top 50 Market Report.

Newspaper reach (%)

	Daily
All adults	63.7
Men	67.2
Women	60.5
MHS	63.1

Source: Single Source Research via TGI Survey. 10,000 adult 18+ sample published twice yearly on a rolling 6 month sample (January-December 2003)

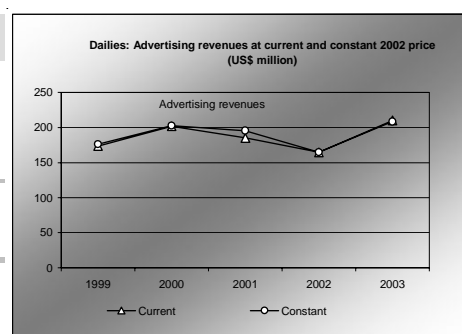
MHS = Main Household Shopper

NUMBER OF TITLES AND CIRCULATION

	1999	2000	2001	2002	2003	Change (%)	
						99/2003	2002/03
Advertising revenues (US\$ million)							
Dailies	174	202	185	165	210	20.93	27.45
Dailies \$	176	203	196	165	208	18.13	26.44
Non-dailies	74	87	90	85	49	-33.98	-42.67
Sundays	137	149	144	130	134	-2.47	2.97
Volume of advertising sold (pages & page equivalents)							
In colour	90,323	120,544	119,135	114,826	-	-	-
Total	152,224	175,023	162,592	152,427	-	-	-

\$ at constant 2002 prices

Typical percentage discount is 50%



MORE FACTS

Contribution of classified and display advertising to total advertising income (%)

	1999	2000	2001	2002	2003
Display	83.2	90.9	98.9	98.2	99.972
Classified	16.8	9.1	1.1	1.8	0.010
Inserts	-	-	-	-	0.018

Top dailies (2003)

Title	Publisher	Readership 000
Maariv	Maariv	891
Yediot Achronot	Yediot Achronot	1,578
Haaretz	Shoken	285
Globes	Globes Publisher	117

Source: Single Source Research via TGI Survey. 10,000 Adult 18+ sample published twice yearly on a rolling 6 month sample (January-December 2003).

**Top ten advertising categories (2003)**

Advertising sector	Newspaper expenditure %
Mobile telecommunications	16.6
Retail chains	13.3
Private vehicles	10.5
Clothing	7.6
Movies	6.8
Image projection	6.5
Electricity	6.5
Banking	5.9
Housing	5.6
Dairy products	5.4

Source: IFAT

Top ten advertisers (2003)

Advertiser	Newspaper expenditure US\$ million
Procter & Gamble	10.6
Tnuva	10.3
Elite	9.5
Telephone	9.3
Partner Orange	9.0
Cellcom	7.8
The Central Bottling Company	7.7
Mifal Hapayis	7.7
Strauss	7.4
Bezeg	7.0

Source: IFAT

Online readership (% of population) *

	2001	2002	2003
Y-net	15.9	22.4	24.0
Globes	5.1	6.8	6.9
Maariv	11.8	15.8	16.7
Haaretz	9.8	11.4	10.5

Source: Single Source Research via TGI Survey.

10,000 adult 18+ sample published twice yearly on a rolling 6 month sample.

* Visit the site at least once a month

ADVERTISING EXPENDITURE & ECONOMIC DATA**Main economic indicators 1996-2002**

	1996	1997	1998	1999	2000	2001	2002
1 US\$=	4.74						
New Shekels at 2002 rate							
Gross Domestic Product (US\$ billion)							
at current prices	315	355	391	427	464	470	487
% change	16.6	12.6	10.1	9.2	8.8	1.2	3.5
at 2002 prices	366	378	395	410	442	497	487
% change	4.8	3.3	4.4	3.9	7.6	12.5	-2.0
Gross Domestic Product per capita (US 000)							
at current prices	55.3	60.9	65.4	70.0	73.8	72.9	75.4
at 2002 prices	64.3	64.9	66.2	67.3	70.2	77.0	75.4
Population							
Millions	5.7	5.8	6.0	6.1	6.3	6.5	6.5
Consumer Price Index							
2002=100	86.1	93.8	98.9	104.0	105.2	94.7	100.0
% change	11.3	9.0	5.5	5.1	1.1	-4.9	5.6
Ad.spend as a % of GDP	1.32	1.29	1.14	1.15	1.22	0.85	0.74
Advertising Expenditure Growth (%)							
at current prices	7.8	9.3	-2.0	10.2	14.6	-29.1	-9.9
at 2002 prices	-3.1	0.3	-7.0	4.8	13.4	-25.4	-14.8

Source: IFS, ZenithOptimedia

Advertising expenditure

(New Shekels million, in current prices)

	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
Newspapers	2,407	2,620	2,511	2,805	3,317	2,132	1,815	1,706	1,710	1,796	1,890
Magazines	161	175	204	199	232	237	242	223	227	242	251
Television	1,071	1,147	1,123	1,213	1,237	1,113	1,042				
Radio	246	313	322	365	464	280	265				
Miscellaneous	9	9	5	14	14	14	14				
Outdoor	280	298	308	332	370	194	190				
Internet	0	0	0	0	14	33	38				
Total	4,174	4,563	4,473	4,928	5,648	4,004	3,606	3,426	3,530	3,705	3,885

Source: 1996-2002 Advertising Association of Israel, 2003-2006 ZenithOptimedia

Research

Circulation is audited by: Circulation is not audited.

Readership is measured by: Single Source Research via TGI Survey.

Methodology: A sample of 10,000 18+ adults are given a self-completion questionnaire including consumption habits, product

and brand usage, lifestyles, media usage and demographics. Data is published twice yearly on a rolling 6 month sample and published electronically utilizing Telmar Media Planning Software

Taxes

VAT on: sales 18%

Commentary - FIEG

The Italian economy is struggling with weak domestic and foreign demand, and exports have suffered as the euro has appreciated. GDP grew by only 0.4% in 2003, the same rate as in 2002.

Despite this economic weakness, the financial health of the daily press improved remarkably in 2002 and 2003. Publishers reacted to the slowdown in advertising revenues (-6.6%) and copy sales (-4.5%) in 2002 by cutting costs, increasing cover prices and above all by extending newspaper activities to offer collections of novels, encyclopaedias and series of books. Many titles – above all the national titles – began offering these extra services to stop the decline in their circulations; they have been very successful and have provided newspapers with a large second stream of income and a new means to promote themselves and capture new readers. In 2002, 44.2 million copies of books were sold as supplements to daily newspapers. This represents about 44% of the whole book market. A further increase is expected in 2003 and 2004.

In 2003 the downturn in advertising slackened (-0.5%) and copy sales showed a slight recovery (+0.1%). Operating revenues rose by 2.5% in 2002 and 1.1% in 2003, while running costs decreased by 0.6% and 0.4% respectively. Consequently gross operating profits grew by 42.5% in 2002 and 1.3% in 2003. Gross margins increased from 7.3% in 2001 to 10.3% in 2003.

POPULATION

Adult population by age and sex

	All adults		Male		Female	
	000	%	000	%	000	%
14-17	2,316	5	1,200	5	1,116	4
18-24	4,854	10	2,475	10	2,379	9
25-34	9,073	18	4,587	19	4,486	17
35-44	8,807	18	4,438	18	4,369	17
45-54	7,740	15	3,843	16	3,897	15
55-64	6,787	14	3,265	14	3,522	14
64+	10,525	21	4,314	18	6,211	24
Total	50,102	100	24,122	100	25,980	100

Source: Audipress 2003

Age structure of readership

Age	% of readership	% daily reach within age group
14-17	3.9	32.8
18-24	9.9	40.2
25-34	19.5	42.3
35-44	19.0	42.4
45-54	17.7	44.9
55-64	14.0	40.6
65+	16.1	30.2

Source: Audipress 2003

Newspaper reach (%)

	Daily
All adults	39.3
Men	50.0
Women	29.4
MHS	31.7

MHS: Main Household Shopper

Source: Audipress 2003

The advertising market grew by 3.3% in 2003, but once again the best-performing medium was television (+4.9%), particularly the private channels.

Newspapers' share of the ad market fell from 21.1% in 2002 to 20.1% in 2003. The share of the press as a whole (newspapers + magazines) fell in the same period from 35.6% to 34.4%. These losses were largely the result of the growth of television, which increased its market share from 53.4% to 54.0%. In 2004 advertising seems to be picking up somewhat (about +4%), though a full recovery is still not in sight.

On December 2 2003 the Italian Parliament passed a controversial media bill called the Gasparri law, named after Communication Minister Maurizio Gasparri. On December 15 the President of the Republic Carlo Azeglio Ciampi used his constitutional right to send the bill back to Parliament for review. President Ciampi rejected the bill for reasons of unconstitutionality and, particularly, for not safeguarding pluralism in the media landscape and threatening to reinforce existing dominant positions.

The decision to demand that Parliament think again is an opportunity to redraft the law and make it more acceptable to media professionals.

Adult population by social class and sex

	All adults		Male		Female	
	000	%	000	%	000	%
AB	1,166	2	623	3	543	2
C1	7,113	14	3,618	15	3,495	13
C2	29,921	60	14,605	61	15,316	59
D	10,190	20	4,566	19	5,624	22
E	1,712	3	710	3	1,002	4
Total	50,102	100	24,122	100	25,980	100

Source: Audipress 2003

AB = entrepreneurs/professionals/managers

C1 = clerks/junior managerial/administrative

C2 = skilled manual workers

D = semi and unskilled manual workers

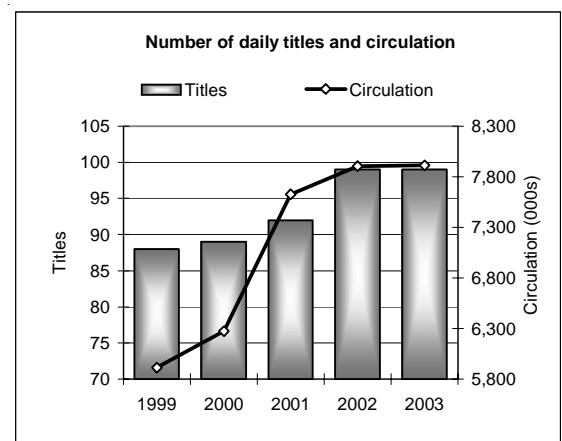
E = housewives/students/retired/unemployed

NUMBER OF TITLES AND CIRCULATION

	1999	2000	2001	2002	2003	Change (%)	
						99/2003	2002/03
Number of titles							
Total dailies	88	89	92	99	99	12.50	0.00
National dailies	21	21	21	21	21	0.00	0.00
Regional & local dailies	67	67	68	70	70	4.48	0.00
Free dailies	-	1	3	8	8	-	0.00
Circulation (000)							
Total dailies	5,914	6,273	7,627	7,906	7,911	33.77	0.06
National dailies	3,513	3,658	3,660	3,530	3,533	0.57	0.08
Regional & local dailies	2,401	2,415	2,397	2,276	2,278	-5.12	0.09
Free papers	-	200	1,570	2,100	2,100	-	0.00
Total annual sales (millions of copies)							
Total dailies	2,061	2,137	2,529	2,555	2,557	24.07	0.08
National dailies	1,226	1,253	1,287	1,232	1,233	0.57	0.08
Regional & local dailies	835	834	850	798	799	-4.31	0.13
Free papers	-	50	392	525	525	-	0.00

Source: Dati & Tariffe

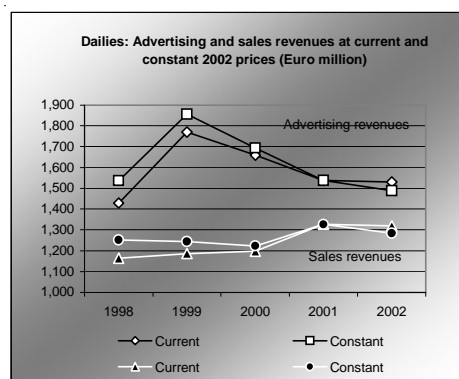
Information is based only on members of FIEG





MORE FACTS

	1999	2000	2001	2002	2003	Change (%)	
						99/2003	2002/03
Advertising revenues (Euro million)							
Dailies	1,429	1,770	1,659	1,538	1,530	7.07	-0.52
Dailies §	1,537	1,856	1,693	1,538	1,488	-3.16	-3.23
Sales revenues (Euro million)							
Dailies	1,164	1,186	1,198	1,326	1,320	13.40	-0.45
Dailies §	1,252	1,244	1,223	1,326	1,284	2.57	-3.16
National dailies	683	707	700	809	799	16.98	-1.24
Regional & local dailies	481	479	498	517	521	8.32	0.77
Volume of advertising sold (pages & page equivalents)							
Total	259,728	281,365	307,531	316,141	327,000	25.90	3.43



Source: Osservatorio FCP-FIEG

§ at constant 2002 prices

Typical discount to ratecard is around 50%. VAT not included.

The above figures include classifieds and inserts

Contribution of classified, display and insert advertising to total advertising income (%)

	1999	2000	2001	2002	2003
Display	92.4	93.9	92.4	92.2	92.1
Classified	7.6	6.1	7.6	7.8	7.9

Source: Osservatorio FCP FIEG

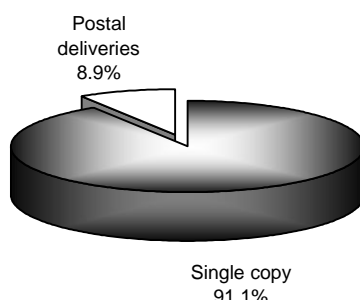
Distribution and newsprint costs

	1999	2000	2001	2002	2003
As % of average cover price					
Single copy sales	26.0	27.3	27.3	23.4	24.0
Postal deliveries	15.6	15.6	15.6	13.3	14.0
Average cost per copy					
Subscription Euro	0.12	0.12	0.12	0.12	0.13
Single copy Euro	0.20	0.21	0.21	0.21	0.22
Newsprint costs (average per ton)					
Euro	542.3	568.1	630.0	603.0	550.0

Type of newspaper sales (%)

	Single copy	Postal deliveries
1999	91.2	8.8
2000	91.6	8.4
2001	91.0	9.0
2002	91.2	8.8
2003	91.1	8.9

Type of newspaper sales in 2003 (%)



Cover prices

	Euro
Single copy	0.90-1.05
Subscription	0.64-0.85

Top ten dailies (2003)

Title	Publisher	Circulation (000)	Readership (000)	Cover Price		Format	Full page rate (Euro)	
				Euro	US\$		Mono	Colour
Corriere della Sera	RCS Editori	679	2,678	0.90	0.85	Broadsheet	108,000	140,000
Repubblica	Gruppo Ed. L'Espresso	622	2,704	0.90	0.85	Tabloid	108,000	151,200
La Gazzetta dello Sport	RCS Editori	406	3,269	0.90	0.85	Broadsheet	37,800	54,000
Il Sole 24 Ore	Il Sole 24 Ore S.p.A.	397	1,227	1.00	0.94	Broadsheet	-	-
La Stampa	Editrice La Stampa	370	1,598	0.90	0.85	Broadsheet	117,600	176,960
Corriere dello Sport	Corriere dello Sport s.r.l.	288	1,506	0.90	0.85	Broadsheet	39,536	55,350
Il Messaggero	Il Messaggero S.p.A.	252	1,267	0.90	0.85	Tabloid	-	-
Il Giornale	Soc. Europea di Edizioni	216	746	0.90	0.85	Broadsheet	50,400	75,600
Il Resto del Carlino	Poligrafici Editoriale	179	1,198	0.90	0.85	Tabloid	-	-
La Nazione	Poligrafici Editoriale	145	892	0.90	0.85	Tabloid	-	-

Source: ADS November 2002-October 2003, Audipress 2003

Online readership *

Newspaper	2003
Repubblica	repubblica.it 32,475
Corriere della Sera	corriere.it 28,999
Gazzetta dello Sport	gazzetta.it 27,943
Il Mattino Il Messaggero	caltanet.it 7,987
Il Sole 24 Ore	ilssole24ore.com 7,637

Source: Audiweb

* page views in December 2003

Internet publishing (No. of online editions)

	1999	2000	2001	2002	2003
Dailies	62	88	89	91	91



Employment & salary

	1998	1999	2000	2001	2002
Total no. of journalists	5,208	5,246	5,551	5,509	5,676
Total no. of employees	8,978	8,512	8,458	8,067	7,758
Total salary costs					
<i>Euro (000s)</i>	820,804	829,268	832,268	863,424	875,915

Newspaper colour capability & formats

	1999	2000	2001	2002	2003
4-colour newspapers	63	76	76	82	82
Broadsheets	55	53	53	54	53
Tabloids	33	35	36	37	38

Top ten publishing companies (2003)

(ranked by total revenue)

RCS Editori
 Gruppo Editoriale L'Espresso
 Il Sole 24 Ore
 Poligrafici Editoriale
 Caltagirone Editore
 Editrice La Stampa
 Corriere dello Sport
 Finegil
 Società Europea di Edizioni
 Editoriale Il Gazzettino

Top ten advertising categories (2003)

Advertising sector	% of display ad revenue
Auto	20.2
Retail	12.3
Finance & insurance	9.4
Legal & corporate	8.3
Telecommunications	7.1
Tourism & travel	5.1
Fashion	5.0
Education & publishing	5.0
Computer & photography	3.9
Household equipment	3.2

Source: Nielsen

Top ten advertisers (2003)

Advertiser

Fiat Auto Division
 Vodafone
 Ford
 Toyota
 Esselunga S.p.A.
 Renault
 Liol
 Euronics
 Fiat Lancia Division
 Telecom Italia

Source: AC Nielsen

CROSS MEDIA OWNERSHIP

Owners	Regional TV	National TV	Regional Newspapers	National Newspapers	Radio
Regional TV Licensees	One licence per micro region and three licences in all	Not allowed	Max 50% of circ. in any macro region/max half of titles in any micro region	Max 20% of all circulation	No national stations, but regional stations allowed
National TV Licensees	Not allowed	Max 20% of national stations (i.e. 2 of 12)	1 channel=max 16% of all daily circ. 2 channels=8%, 3 channels=0%	See left	Not allowed
Regional Newspaper Owners	One licence per micro region and three licences in all	1 channel=max 16% of all daily circ. 2 channels=8%, 3 channels=0%	Max 50% of circ. in any macro region/max half of titles in any micro region	Max 20% of all circulation	No limit
National Newspaper Owners	As above	As above	As above	As above	As above
Local radio Licensees	Allowed	Not allowed	As above	As above	No nat. stations, but further regional stations allowed
National radio Licensees	Not allowed	Not allowed	As above	As above	Max 25% of national stations
Foreign Investors	No limit inside EU. Reciprocal arrangements with some other countries	See left	See left	See left	See left

There are four macro-regions and 21 micro-regions.

No-one may control more than 20% of total newspaper circulation, regional plus national

ADVERTISING EXPENDITURE & ECONOMIC DATA

Advertising expenditure

(Euro millions, in current prices)

	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
Newspapers	1,104	1,231	1,383	1,580	1,818	1,707	1,589	1,568	1,601	1,642	1,700
Magazines	806	845	936	1,029	1,158	1,189	1,094	1,105	1,141	1,184	1,225
Television	2,807	3,067	3,337	3,680	4,134	4,004	4,024				
Radio	232	267	319	382	454	413	382				
Cinema	19	25	36	42	50	57	56				
Outdoor	190	227	255	284	318	328	289				
Internet	0	0	7	29	138	107	99				
Total	5,157	5,663	6,274	7,027	8,070	7,805	7,534	7,782	8,086	8,413	8,763

Source: 1996-2002 Media Key, 2003-2006 ZenithOptimedia

Notes: Excludes agency commission, excludes production costs, excludes classified advertising, after discounts, magazines includes newspaper supplements.

**Main economic indicators 1996-2002**

	1996	1997	1998	1999	2000	2001	2002
1 US\$= 1.06 Euro at 2002 rate							
Gross Domestic Product (Euro billion)							
at current prices	979	1,020	1,063	1,109	1,165	1,217	1,258
% change	6.1	4.1	4.2	4.3	5.1	4.5	3.4
at 2002 prices	1,114	1,137	1,162	1,192	1,222	1,242	1,258
% change	2.0	2.1	2.2	2.6	2.5	1.7	1.3
Gross Domestic Product per capita (Euro 000)							
at current prices	17.1	17.7	18.5	19.2	20.2	21.0	21.7
at 2002 prices	19.4	19.8	20.2	20.7	21.1	21.4	21.7
Population							
Millions	57.4	57.5	57.6	57.7	57.8	58.0	58.0
Consumer Price Index							
2002=100	87.9	89.7	91.5	93.0	95.4	98.0	100.0
% change	4.0	2.0	2.0	1.7	2.5	2.7	2.1
Ad.spend as a % of GDP							
	0.53	0.56	0.59	0.63	0.69	0.64	0.60
Advertising Expenditure Growth (%)							
at current prices	8.0	9.8	10.8	12.0	14.9	-3.3	-3.5
at 2002 prices	3.8	7.6	8.6	10.2	12.0	-5.9	-5.4

Source: IFS, ZenithOptimedia

Research

Circulation is audited by: ADS (Accertamento Diffusione Stampa), which audits the circulation of 55 daily newspapers under voluntary agreements.

Readership is measured by: Audipress

Methodology: interviews with a sample of 42,000 individuals.

Taxes

VAT on: sales 4% advertising 20%
newsprint 4% plant 20%
composition 4% (standard VAT rate 20%)

Profits are taxed at 35% from 1 January 2003. At the beginning of 1998 the ILOR tax of 16.2% of profits was abolished and replaced by a new tax called IRAP, of 4.25% of turnover.

Outdoor advertising is taxed locally at a rate determined by the size of population, at between Euro 8.26 and Euro 16.52 per square metre per year. There are five population bands:

- 1: More than 500,000
- 2: Between 100,000 and 500,000
- 3: Between 30,000 and 100,000
- 4: Between 10,000 and 30,000
- 5: Under 300

Light-emitting sites are taxed at four times these rates. Sound-emitting static outdoor incurs a 250% supplement. Light-emitting mobile (vehicular) posters are taxed at the basic rate, with a 50% surcharge for illumination. Door-drops, leaflets etc. attract a daily rate of Euro 2.06 to Euro 4.13, with a sound/light surcharge of 50%. Point-of-sale ads for newspapers and magazines are tax-exempt. Posters, bills and street furniture attract a separate tax. For a typical 70cmx100cm poster, these rates vary between Euro 1 and Euro 1.45 for the first 10 days, and Euro 0.30 to Euro 0.45 for each subsequent five-day period.

	1999	2000	2001	2002	2003
Euro 000	56.810	56.810	56.810	94.000	94.000

Subsidies

Tax concessions are generally valid for all industrial sectors, but revenue in southern Italy is free from local income taxes when reinvested in the same activity (Bill No.64 of March 1, 1986, Article 14). There is no newsprint subsidy, but cheap loans (2.45% compared to usual 4.90%) are available for capital

investment from financial institutions, and these are reimbursed by the government. Machinery and buildings both qualify. Such loans may not exceed Euro 7.75 million, and must be repaid in ten years. Direct general subsidies to the newspaper industry ended in 1987, and are now only available to newspapers attached to parliamentary parties.

Direct subsidies to the general newspaper industry ended in 1987. Direct subsidies of Euro 94 million are only available to newspapers and periodicals attached to parliamentary parties or published by cooperatives.

The older scheme for assisting newspapers to modernise has been incorporated into the new system operated by the fund for granting loans to publishing companies (Bill No.62, 7 March 2001). The bill introduced a credit tax of 3% to help publishing companies with new investments. Such a facility relieves publishers of the initial cost of acquiring new plant and machinery. It doesn't include the cost of buildings to house the plant concerned. The credit tax is distributed over a period of five years, beginning from 2001.

One of the innovations introduced by Bill No.62 consists in two systems for granting loans. The first one works automatically for loans not exceeding Euro 516,000, concerning investments to be carried out over two years. A government committee will grant the loan, after merely establishing that the application was made correctly. The second one is a valuation system for loans of between Euro 516,000 and Euro 15.5 million. In this case the committee not only checks that the application is valid but must also assess the financial, technical and economic soundness of the investment plan.

Discounts

on: post 35-45% rail 0
telephone 50% telegraph 0
telex 0

Newspapers with ad content of 45% or less may claim the 35-45% discount from postal rates, determined by weight.



Ownership

Does any law exist governing publishing-house ownership, or the registration of shares in newspaper-publishing companies? Yes, individuals and corporations have to register their newspaper interests. Magazines with five or more full-time journalists and more than 12 issues a year count as newspapers for these purposes.

Is there any law prohibiting or restricting foreign companies or individuals from owning shares, and in particular, the majority of shares, of domestic daily newspapers? No restriction on EU countries. Reciprocal arrangements apply to some other countries.

Is there any law prohibiting daily newspaper or periodical publishers from operating radio or television stations in the same locality? Daily newspaper publishing companies with more than 16% of national circulation may not be licensed to own national television stations. Publishers with 8% to 16% of circulation may own one national television station. Publishers with less than 8% may own two licences.

Law 249, passed on July 1997, has provided, as a general rule, that no one may control more than 20% of all mass media resources. "Mass media resources" means all revenue coming from sales of daily newspapers and periodicals, sales or exploitation of audio-visual products, subscriptions to dailies, periodicals, radio and television stations, advertising (including sponsorship and telemarketing), licence fees and regular public subsidies, and electronic publishing for household consumption.

So as to guarantee disclosure and transparency in the capital structure and to avert silent partnerships, is there a law or rule making it possible to determine who actually owns a publishing company? Law 416 (Article 1) provides that daily newspapers must be owned only by individuals, private unlimited partnerships, limited partnerships (non-stock corporations) and public corporations. Voting shares or partnership of a publishing house may be registered under the name of another company only if the majority of the voting shares of this other company are registered under the name of individuals or companies quoted on the stock exchange, whose identity is thus a matter of public record.

Is there an antitrust law limiting concentration in the daily press? Law 416 (Article 4) specifically limits daily press concentration

to 20% of all circulation, or 50% in one of Italy's four large ('macro') regions, or half of titles in one of the 21 smaller regions. (The latter rule obviously does not apply if there is only one title.) Any purchase (or equivalent) which breaches these limits is liable to be declared void in court, but the limits may be exceeded in the normal course of organic business growth.

Is further regulation of media concentration expected? The Gasparri law, approved on December 3 2003 but rejected by the President of the Republic, must be redrafted by the Parliament according to the President's remarks. If Parliament approves the bill a second time, the President cannot legally reject it again.

The text is mainly devoted to the transition between analogue and digital terrestrial broadcasts. It extends the current allocations of terrestrial frequencies until 2006, when 100% of the national territory should be covered by digital terrestrial broadcasts. In the meantime all the analogue television broadcasters will be automatically authorized to carry out digital transmissions.

Furthermore, the law greatly expands the definition of 'mass media resources' under antitrust regulations. The so called "sistema integrato delle comunicazioni" (integrated communication system) will introduce a new accounting method that lumps in revenue generated by television advertising, annual fees for accessing television and radio stations, radio advertising, daily newspapers, periodicals, movie ticket sales, outdoor advertising, year-books and electronic publishing distributed over the internet. No owner may control more than 20% of all revenue generated by these methods. The increased size of the market makes the share of each media owner more modest. During the last parliamentary session the revenues considered have been reduced, to exclude those coming from book publishing and the music industry.

Moreover, the bill will allow cross ownership of newspapers and television stations. The newspaper publishers will be allowed to enter the television sector immediately, but owners of television stations will have to wait until 2009 to enter the newspaper market. Given the different scales of the television and publishing markets, it will be much easier for television owners to enter the newspaper sector than vice versa.

POPULATION & MORE FACTS

Population by age and sex

	All individuals		Male		Female	
	000	%	000	%	000	%
0-14	7,722	46	3,875	45	3,847	46
15-64	8,707	52	4,468	52	4,239	51
65+	376	2	185	2	191	2
Total	16,805	100	8,528	100	8,277	100

Source: CIA - The World Factbook 2002

Top newspapers (2002)

Title	Circulation (000)	Full page rate (Euro)	
		Mono	Colour
Ivoir/Soir	55	748	1,215
Fraternité Matin	35	1,104	1,631
Notre Voie	25	878	1,317
Le Jour	-	994	1,570

Source: HMI

Excluding 20% local taxation

ADVERTISING EXPENDITURE & ECONOMIC DATA

Main economic indicators 1996-2002

	1996	1997	1998	1999	2000	2001	2002
--	------	------	------	------	------	------	------

1 US\$= 696.99 CFA Francs at 2002 rate

Gross Domestic Product (CFA Francs billion)

at current prices	5,549	6,234	6,773	6,833	6,671	6,753	-
% change	11.3	12.4	8.6	0.9	-2.4	1.2	-
at 2002 prices	6,707	7,246	7,519	7,526	7,175	6,960	-
% change	8.5	8.0	3.8	0.1	-4.7	-3.0	-

Gross Domestic Product per capita (CFA Francs 000)

at current prices	375.4	414.5	440.7	435.5	406.8	398.6	-
at 2002 prices	453.8	481.8	489.2	479.7	437.5	410.9	-

Population

Millions	14.8	15.0	15.4	15.7	16.4	16.9	-
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Consumer Price Index

2002=100	82.7	86.0	90.1	90.8	93.0	97.0	100.0
% change	2.5	4.0	4.7	0.8	2.4	4.3	3.1

Source: IFS, ZenithOptimedia

POPULATION & MORE FACTS

Population by age and sex

	All individuals		Male		Female	
	000	%	000	%	000	%
0-14	772	29	395	29	377	28
15-64	1,740	65	871	65	869	64
65+	184	7	82	6	102	8
Total	2,696	100	1,348	100	1,348	100

Source: CIA 2003

Top dailies (2003)

Title	Publisher	Circulation (000)	Format
The Gleaner	The Gleaner Company	45 *	-
Jamaica Observer	-	-	-
The Star	The Gleaner Company	-	Tabloid

Source: WAN

* Circulation of Sunday edition is 95,000

	2002
Number of national dailies	3

Source: WAN

Main economic indicators 1996-2002

	1996	1997	1998	1999	2000	2001	2002
--	------	------	------	------	------	------	------

1 US\$= 48.42 J\$ at 2002 rate

Gross Domestic Product (J\$ billion)

at current prices	237	258	273	294	329	358	-
% change	18.7	8.7	6.0	7.6	11.9	8.8	-
at 2002 prices	371	368	359	365	377	383	-
% change	-6.1	-0.9	-2.4	1.5	3.4	1.7	-

Gross Domestic Product per capita (J\$ 000)

at current prices	94.2	101.6	106.8	114.9	125.2	137.7	-
at 2002 prices	147.3	144.9	140.2	142.4	143.4	147.5	-

Population

Millions	2.5	2.5	2.6	2.6	2.6	2.6	-
----------	-----	-----	-----	-----	-----	-----	---

Consumer Price Index

2002=100	63.9	70.1	76.2	80.7	87.3	93.4	100.0
% change	26.4	9.7	8.6	5.9	8.2	7.0	7.1

Source: IFS, ZenithOptimedia

Commentary - Nihon Shinbun Kyokai (NSK - The Japan Newspaper Publishers and Editors Association)

There are signs of recovery for the Japanese economy, as suggested by slight growth in consumer spending and capital investment, among other indications. The main reasons for the positive outlook are the following: 1) increases in exports to the United States and East Asia (whose economies are improving) have improved capacity operating rate; 2) continuing corporate restructuring has bolstered corporate profits; and 3) sales of digital home appliances like cell phones, DVDs and digital cameras have been brisk, while IT-related demands have returned. With increasing corporate vitality, the Japanese economy might have discovered ways for an upward trend. Many observers forecast that company earnings in general industries are very likely to increase for two consecutive years in FY2002 and FY2003. Profitability is increasing at many companies, and optimistic trends in capital investment can be seen, as the increasing sophistication of products and technology is spurring companies to move overseas production lines back to Japan, resulting in large-scale upgrading of facilities.

However, the signs of any economic recovery are barely noticeable to individual consumers, whose household budgets continue to be strained by social security burdens, notably rising pension payments. Furthermore, the prospects for continued long-term economic growth remain unclear, threatened by trends in the US economy and exchange rates for the yen.

While business in general is showing positive signs of a recovery, the newspaper industry remains sunk in a severe business environment. According to a survey on newspaper business trends conducted by Nihon Shinbun Kyokai (NSK, the Japan Newspaper Publishers and Editors Association), the total revenue for the companies surveyed in FY2002 dropped 3.3% from the previous year, the second consecutive year of significant decline. Profits for the term fell 23.0%, marking the second straight year of declining profits. These results clearly reflect a lag in economic recovery, compared to results for companies in other industries. With circulation revenues stagnated and advertising revenues continuing to drop in 2003, further revenue decline is unavoidable.

Meanwhile, another NSK study, conducted in October 2003, shows that total average circulation dropped 0.6% from the previous year, the fourth consecutive year of circulation decline. Consequently, stagnation or a slight decrease in sales

revenue is inevitable. Various factors contribute to these trends: cancellations of corporate subscriptions as a result of the long economic slump; a lack of interest in newspapers among younger generations; an increasing number of non-subscribers due to the diffusion of the internet and other electronic media; and a decline in set subscriptions (package of morning and evening editions) as more people choose not to take the evening paper.

Advertising revenues for the second half of 2003 showed signs of an upturn, reflecting the underlying economic recovery. However, declining revenues in the first half of 2003 resulted in a third straight annual decline. According to "Advertising Expenditures in Japan 2003," compiled by Dentsu, Inc., newspaper advertising fell 1.9% in 2003. Although the figure was much less than the 11.0% drop of 2002, newspapers share of total advertising spend ended up at 18.5%, slightly down from 18.8% in 2002. Internet advertising expenditure marked a significant increase of 40.0%, questioning further the position of newspapers, as competition among media intensifies with the advance of electronic media.

In contrast, flyers strengthened their presence in the media with sales staying level despite the severe recession of the last three years. In 1993, flyers accounted for less than 30.0% of total newspaper advertising expenditure but had reached 48.7% by 2003. Flyers offer the advantage of selective advertising for a smaller area. In addition, a growing number of newspaper companies are utilizing free papers and supplements as new advertising media, to try to reach new advertisers who do not normally utilize regular newspapers for ads.

Newspaper companies are striving to increase revenues by cutting labour and newsprint costs, to cover decreases in sales figures precipitated by downturns in their two main sources of revenue, circulation and advertising. From the previous year, however, there was a marked upsurge in capital investment to expand usage of a news item to electronic media, among others, to compete against other media. Movements to realign or merge newspaper production departments or create them as separate entities are gaining momentum. Widespread construction of new printing plants and offices has also continued. Newspapers need to invest to counter declining interest of readers, and thus are being required to make accurate business judgments in the current climate of revenue decreases.

POPULATION

Population by age and sex

	All individuals		Male		Female	
	000	%	000	%	000	%
Children	17,956	14	9,199	15	8,757	14
15-24	14,767	12	7,544	12	7,223	11
25-34	18,829	15	9,629	16	9,200	14
35-44	15,988	13	8,121	13	7,867	12
45-54	18,240	14	9,162	15	9,078	14
55-64	17,061	13	8,379	14	8,682	13
65+	23,848	19	10,017	16	13,831	21
Total	126,688	100	62,050	100	64,638	100

Source: Residential Register

Housewives (co-habiting persons)

	Households 000	Housewives 000
under 25	49,261	497
25-34		5,088
35-44		6,409
45-54		8,033
55-64		6,590
over 65		5,819
Total		32,436

Source: 2000 Population Census



Households

Occupancy	Households 000
1 person	12,911
2 people	11,743
3 people	8,810
4 people	7,925
5 or more people	5,392
without children	28,375
with children	18,407
with oldest child aged 0-5	5,356
with oldest child aged 6-17	13,051
Total	46,782

Source: 2000 Population Census

Newspaper reach (%)

	Daily
All adults	94.4
Men	95.0
Women	93.8

Source: NSK (2001)

NUMBER OF TITLES AND CIRCULATION

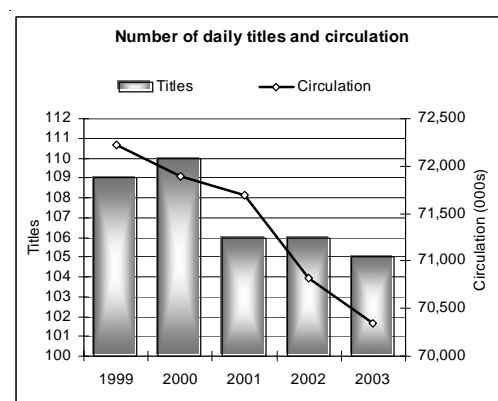
	1999	2000	2001	2002	2003	Change (%)	
						99/2003	2002/03
Number of titles							
Total dailies	109	110	106	106	105	-3.67	-0.94
National dailies	5	5	5	5	5	0.00	0.00
Regional and sport dailies	104	105	101	101	100	-3.85	-0.99
Non-dailies	-	-	-	-	-	-	-
Free papers	122	153	158	179	190	55.74	6.15
Circulation (000)							
Total dailies	72,218	71,896	71,694	70,815	70,339	-2.60	-0.67
National dailies	40,318	40,332	40,229	39,773	39,595	-1.79	-0.45
Regional dailies*	25,608	25,257	25,344	25,234	25,152	-1.78	-0.32
Sports dailies	6,293	6,307	6,122	5,808	5,592	-11.13	-3.72
Free papers	18,066	19,915	21,190	21,576	22,170	22.72	2.75

Source: NSK, except free papers, which are from Japan ABC

*includes specialised dailies

Many Japanese dailies print morning and evening editions as well as on Sundays.

All regional editions published by the regional HQ of the same company are counted as one title



MORE FACTS

	1999	2000	2001	2002 †	2003	Change (%)	
						99/2003	2002/03
Advertising revenues (Yen billion)							
Dailies	845	901	869	781	773 *	-7.57	-1.02
Dailies \$	825	886	860	781	777 *	-	-
Sales revenues (Yen billion)						**	**
Dailies	1,288	1,284	1,286	1,283	-	-0.39	-0.23
Dailies \$	1,257	1,262	1,273	1,283	-	2.03	0.77
Volume of advertising sold (pages & page equivalents)							
Total	401,659	419,730	-	402,737	397,338	-1.08	-1.34
In colour	53,982	-	-	65,832	73,129	35.47	11.08

Source: NSK, Dentsu

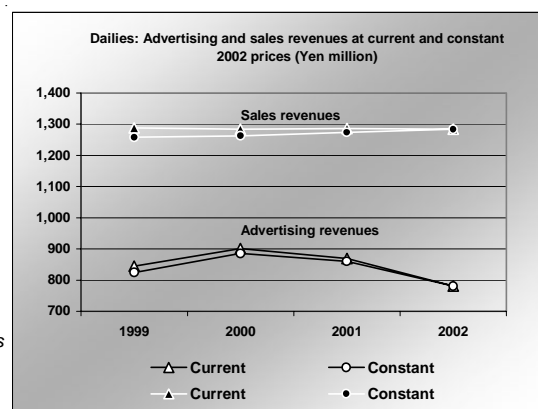
§ at constant 2002 prices

Ad revenues include discounts

* WAN/ZenithOptimedia estimate

** % change 99/2002 and 2001/02

† advertising and sales revenues figures are estimates

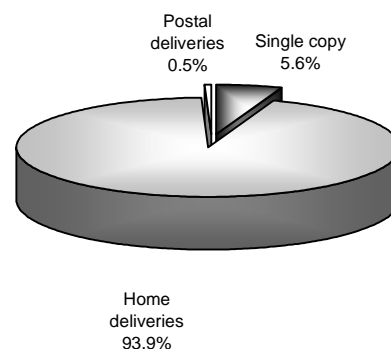


Type of newspaper sales (%)

	Single copy	Home deliveries	Postal deliveries
1999	6.1	93.3	0.6
2000	6.0	93.5	0.6
2001	6.1	93.4	0.6
2002	5.6	93.8	0.6
2003	5.6	93.9	0.5

Source: NSK

Type of newspaper sales in 2003 (%)





Top dailies (2003)

Title	Publisher	Circulation (000)	Cover Price				Format	Full page rate (Yen 000)	
			Yen	US\$	Yen	US\$		Mono [^]	Colour
Yomiuri Shimbun	The Yomiuri Shimbun	14,081	130	1.23	50	0.47	Broadsheet	47,910	56,450
The Asahi Shimbun	The Asahi Shimbun	12,235	130	1.23	50	0.47	Broadsheet	39,855	54,435
Mainichi Shimbun	The Mainichi Newspapers	3,957	130	1.23	50	0.47	Broadsheet	25,920	32,692
Nihon Keizai Shimbun	Nihon Keizai Shimbun, Inc.	4,643	140	1.32	50	0.47	Broadsheet	17,730	22,630
Chunichi Shimbun	The Chunichi Shimbun	4,542	110	1.04	50	0.47	Broadsheet	17,400	20,750
Sankei Shimbun	Sankei Shimbun Co., Ltd.	2,723	100	0.94	50	0.47	Broadsheet	13,950	16,350
Tokyo Sports	Tokyo Sports Press	2,425	-	-	120	1.13	Broadsheet	-	-
Nikkan Sports	The Nikkan Sports News	1,975	130	1.23	-	-	Broadsheet	7,479	9,829
Hokkaido Shimbun	The Hokkaido Shimbun Press	1,935	130	1.23	50	0.47	Broadsheet	7,395	8,595
Sports Nippon	The Sports Nippon Newspapers	1,725	130	1.23	-	-	Broadsheet	7,547	8,347
Yukan Fuji	Yukan Fuji	1,559	-	-	120	1.13	Tabloid	-	-
Shizuoka Shimbun	The Shizuoka Shimbun	1,478	80	0.75	30	0.28	Broadsheet	4,650	5,520
Hochi Shimbun	The Hochi Shimbun	1,373	130	1.23	-	-	Broadsheet	6,453	8,653
Sankei Sports	Sankei Sports	1,368	130	1.23	-	-	Broadsheet	5,745	6,445
Nishi-Nippon Shimbun	The NishiNippon Newspaper Co.	1,030	110	1.04	50	0.47	Broadsheet	5,985	7,185
Daily Sports	The Daily Sports	984	130	1.23	-	-	Broadsheet	2,400	3,550
Chugoku Shimbun	The Chugoku Shimbun	799	110	1.04	50	0.47	Broadsheet	3,810	4,910
Kyoto Shimbun	The Kyoto Shimbun Co., Ltd	823	130	1.23	50	0.47	Broadsheet	-	-
Kobe Shimbun	The Kobe Shimbun	821	130	1.23	50	0.47	Broadsheet	4,050	5,050
Kahoku Shimpō	Kahoku Shimpō Publishing Co.	624	110	1.04	50	0.47	Broadsheet	3,450	4,250
Chunichi Sports	The Chunichi Shimbun	573	100	0.94	-	-	Broadsheet	3,300	3,990
Niigata Nippo	The Niigata Nippo	563	110	1.04	40	0.37	Broadsheet	3,450	4,150
Sanyo Shimbun	The Sanyo Press	534	110	1.04	50	0.47	Broadsheet	3,225	4,025
Akita Sakigake Shimpō	The Akita Sakigake Shimpō	530	100	0.94	50	0.47	Broadsheet	2,700	3,100
Shinano Mainichi Shimbun	The Shinano Mainichi Shimbun	531	110	1.04	50	0.47	Broadsheet	3,390	4,090
Nikkan Kogyo Shimbun	The Nikkan Kogyo Shimbun	522	200	1.89	-	-	Broadsheet	-	-
To-o Nippo	The To-o Nippo Press Co., Ltd.	522	100	0.94	50	0.47	Broadsheet	2,880	3,330
Oita Godo Shimbun	Oita Godo Shimbun	501	110	1.04	50	0.47	Broadsheet	2,730	3,130
Kumamoto Nichi-Nichi Shimbun	Kumamoto Nichi-Nichi Shimbun-Sha	485	120	1.13	50	0.47	Broadsheet	2,865	3,365
The Iwate Nippo	Iwate Nippo-Sha Co., Ltd	464	110	1.04	50	0.47	Broadsheet	2,790	3,240
Minami-Nippon Shimbun	Minami-Nippon Shimbun Co., Ltd.	435	110	1.04	50	0.47	Broadsheet	2,730	3,180
Yamagata Shimbun	The Yamagata Newspaper Co.	428	100	0.94	50	0.47	Broadsheet	2,760	3,210
Hokkoku Shimbun	The Hokkoku Shimbun	429	110	1.04	50	0.47	Broadsheet	3,165	3,865
The Naigai Times	The Naigai Times Co., Ltd.	410	-	-	120	1.13	Tabloid	750	1,250

Source: ABC/Chunichi Shimbun. Many Japanese dailies issue morning and evening editions on the same day under the same title.

The above figures count morning and evening issues as two copies.

[^] Mono full page rate represents 3-6 month contract price

Circulation figures for Sports Nippon and Hochi Shimbun can be either a figure determined by ABC or one declared by the paper itself, as different headquarters use different methods. Also, circulation figures for Tokyo Sports, Nikkan Sports, Yukan Fuji, Sankei Sports, Daily Sports, Chunichi Sports, Nikkan Kogyo Shimbun and The Naigai Times are declared by the papers themselves.

Circulation figures for Chunichi Shimbun include those for Tokyo Shimbun, Hokuriku Chunichi Shimbun and Nikkan Kenmin Fukui, which are different editions published by the same newspaper company.

Figure for full page ad rate for Chunichi Shimbun indicates the price for ads in both Chunichi Shimbun and Tokyo Shimbun.

Cost of advertising (color) is of all editions (national daily: 1-4&6, nationwide), full-color, morning edition, 15 columns (full page).

Figure for full page ad rate for Chunichi Shimbun indicates the price for ads in both Chunichi Shimbun and Tokyo Shimbun.

Contribution of classified, display and insert advertising to total advertising income (%)

	1999	2000	2001	2002	2003
Display	95.5	95.4	95.6	95.9	96.0
Classified	4.5	4.6	4.4	4.1	4.0

Source: Dentsu

In Japan revenue from inserts goes to

the delivery agency - not newspaper companies.

Top ten publishing companies (2003)

(ranked by total circulation)

The Yomiuri Shimbun
The Asahi Shimbun
Sankei Shimbun
The Mainichi Newspapers
The Chunichi Shimbun
Nihon Keizai Shimbun
Tokyo Sports Press
The Nikkan Sports News
The Hokkaido Shimbun Press
The Sports Nippon Newspapers

Source: ABC

Top ten advertising categories (2003)

Advertising sector	% of display ad revenue
Transport/leisure	14.4
Publications	10.3
Distribution/retail	9.0
Finance/insurance	7.6
Classified ads/others	7.5
Information/communications	7.5
Real estate	6.6
Auto	6.0
Education/medical services/religion	5.8
Food	4.2

Source: Dentsu

Top ten advertisers (2003)

Advertiser	Newspaper expenditure Yen (Mill)
Hankyu Express International	38,045
Toyota	37,286
Japan Travel Bureau	27,582
Nihon Mail Service	25,957
Kinki Nippon Tourist	21,396
Dell	19,570
Kodansha	17,814
ALICO	16,136
Kowa Shinyaku	14,029
Shogakukan	13,166

Source: MRS

**Employment**

	1999	2000	2001	2002	2003
Total no. of Journalists	20,232	19,434	20,679	20,851	21,311
Total no. of Employees	58,380	56,208	54,565	54,015	53,488

Source: NSK

Media consumption (minutes per day)

	2001
Newspapers	26.0
Magazines	29.3
Radio	119.0
Television	224.0
Internet	54.0

Source: NSK

Internet publishing (No. of online editions)

	1997	1998	1999	2000	2001
Dailies	55	66	71	79	89

Newspaper colour capability and formats

Number of:	1999	2000	2001	2002	2003
4-colour newspapers	109	110	106	106	110
Broadsheets	-	-	103	103	107
Tabloids	-	-	3	3	3

Cover prices

	Yen
Single copy	
Morning	80-140
Evening	30-50
Subscription *	97-146

* cost of morning & evening editions combined per day

CROSS MEDIA OWNERSHIP

Owners	Private TV	All Newspapers	Radio
Private TV Licensees	* 10% ownership cap on contiguous transmission areas; 20% on non-contiguous. Directorship is restricted.	No law, but MPHPT regulation generally prohibits regional domination of press, AM radio, and TV.	Ownership of AM radio station allowed, but FM ownership prohibited.
Regional Newspaper Owners	* 10% ownership cap on contiguous transmission areas; 20% on non-contiguous. Directorship is restricted.	See above	* 10% ownership cap on contiguous transmission areas; 20% on non-contiguous. Directorship is restricted.
National Newspaper Owners	* 10% ownership cap on contiguous transmission areas; 20% on non-contiguous. Directorship is restricted.	See above	Ownership of AM radio station allowed, but FM ownership prohibited.
Satellite TV Broadcasters	33% ownership cap. Directorship is restricted.	No restriction	* 10% ownership cap on contiguous terrestrial transmission areas; 20% on non-contiguous. Directorship is restricted.
Local Radio Licensees	AM owner can control a TV station, FM owner can not.	No law, but MPHPT regulation generally prohibits regional domination of press, AM radio, and TV.	No restriction
National Radio Licensees	No restriction	No restriction	No restriction
Foreign Investors	No licences awarded to any foreigners, foreign governments, organisations or their representatives.	No restriction	No licences awarded to any foreigners, foreign governments, organisations or their representatives.

Media ownership is regulated by the Broadcasting Law and the binding regulation of the Ministry of Public Management, Home Affairs, Posts and Telecommunications

* Applies when two or more broadcasting stations are controlled by one person

Notes:

1. There is no law that directly regulates newspapers, either national or local. The only laws regulating Japanese commercial broadcasters are the Broadcasting Law and Radio Law.
2. The above laws do not apply to the Japan Broadcasting Corporation (NHK).
3. All broadcasting stations in Japan are local.
4. Different restrictions apply to BS (broadcast satellite) analogue, BS digital, CS (communications satellite) analogue and CS digital.



ADVERTISING EXPENDITURE & ECONOMIC DATA

Advertising expenditure		(Yen billion, in current prices)										
	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	
Newspapers	1,238	1,264	1,179	1,154	1,247	1,203	1,071	1,060	1,072	1,083	1,100	
Magazines	407	440	426	418	437	418	405	402	404	406	408	
Television	1,916	2,008	1,951	1,912	2,079	2,068	1,935					
Radio	218	225	215	204	207	200	184					
Outdoor	585	581	563	547	556	547	524					
Internet	2	6	11	24	59	74	85					
Sub-total	4,366	4,523	4,345	4,259	4,586	4,509	4,203	4,235	4,301	4,381	4,381	
Others	1,405	1,473	1,426	1,464	1,584	1,617	1,722					
Total	5,771	5,996	5,771	5,723	6,170	6,126	5,925					

Source: 1996-2002 Dentsu, NSK, 2003-2006 ZenithOptimedia

Notes: Includes production costs, classified advertising, and agency commission at an average 17.5%; after discounts

Main economic indicators 1996-2002

	1996	1997	1998	1999	2000	2001	2002
1 US\$= 107.77 Yen at 2002 rate							
Gross Domestic Product (Yen billion)							
at current prices	510,802	521,862	515,835	511,837	513,534	503,304	498,102
% change	2.6	2.2	-1.2	-0.8	0.3	-2.0	-1.0
at 2002 prices	509,230	511,066	502,092	499,700	504,892	498,271	498,102
% change	2.5	0.4	-1.8	-0.5	1.0	-1.3	0.0
Gross Domestic Product per capita (Yen 000)							
at current prices	4,061.7	4,139.5	4,080.7	4,041.4	4,047.7	3,952.4	3,911.6
at 2002 prices	4,049.2	4,053.8	3,971.9	3,945.5	3,979.6	3,912.9	3,911.6
Population							
Millions	125.8	126.1	126.4	126.7	126.9	127.3	127.3
Consumer Price Index							
2002=100	100.3	102.1	102.7	102.4	101.7	101.0	100.0
% change	0.1	1.8	0.6	-0.3	-0.7	-0.7	-1.0
Ad.spend as a % of GDP							
	0.85	0.87	0.84	0.83	0.89	0.90	0.84
Advertising Expenditure Growth (%)							
at current prices	7.1	3.6	-3.9	-2.0	7.7	-1.7	-6.8
at 2002 prices	7.0	1.8	-4.5	-1.7	8.4	-1.0	-5.9

Source: IFS, ZenithOptimedia

Research

Circulation is audited by: Japan Audit Bureau of Circulation (ABC).

Readership is measured by: NHK Broadcasting Culture Research Institute and other private companies.

Taxes

VAT on: sales 5% advertising 5%
 newsprint 5% plant 5%
 composition 5% (standard VAT rate 5%)

Profits are taxed at 30% for all industries.

Subsidies

Are there subsidies for the purchase of newsprint? None, other than a preferential exemption from import duty on newsprint.

Are there cheap loans for capital investment? No, just slightly more favourable depreciation rules for cars and photographic machinery.

Discounts

on: rail 0 telephone 0 telegraph 0 telex 0

Ownership

Does any law exist governing publishing-house ownership, or the registration of shares in newspaper-publishing companies? Yes. The relevant law is no. 212 of 1951, revised 1966, 'Ownership of Stocks and Equity in a Joint-Stock Company and Limited

Liability Company publishing Daily Newspapers'. This allows publishing companies' articles of association to a) restrict stock transfers to parties unrelated to the daily newspaper's operations, and b) force a shareholder to divest his shares if he loses his ties to the newspaper.

Is there any law prohibiting or restricting foreign companies or individuals from owning shares, and in particular, the majority of shares, of domestic daily newspapers? No

Is there any law prohibiting daily newspaper or periodical publishers from operating radio or television stations in the same locality? No law directly regulates the above activities. An ordinance by the Ministry of Public Management, Home Affairs, Posts and Telecommunications prohibits a business entity or an individual from controlling a newspaper, terrestrial television and AM radio in the same service area.

So as to guarantee disclosure and transparency in the capital structure and to avert silent partnerships, is there a law or rule making it possible to determine who actually owns a publishing company? Some large companies are required to produce investment reports under a 1992 amendment to the Securities and Investment Act.

Is there an antitrust law limiting concentration in the daily press? None, other than the MPT edict above.

Is further regulation of media concentration expected? No

General economic situation

GDP total US\$22.63 billion; GDP per capita US\$4,145 (purchasing power parity; 2002). Consumer price index 103.3 (2002).

Performance of newspapers vs. other media

The government is the sole broadcaster of radio and television programmes and must license all publications. Radio and television news broadcasts are more restricted than the print media. The government has commercial agreements with the British Broadcasting Corporation, the London-based Middle East Broadcasting Center, and Radio Monte Carlo that allow it to simulcast regional programmes using local radio transmitters. Jordan Television reports only the government's position on controversial matters. International satellite television and Israeli and Syrian television broadcasts are available and unrestricted. The number of satellite viewers has increased an estimated 30 fold over the past 12 years to include 10% to 12% of the population. The more popular channels include MBC, which broadcasts from London, and Al-Jazeera. The government joined several other Arab countries in banning the Qatar-based satellite news channel Al-Jazeera from its territory, after the station aired a talk show in which speakers criticized Jordan's moderate policy on the Middle East.

Performance of different types of newspapers

Jordan has five daily newspapers, four in Arabic and one in English, as well as 11 weekly newspapers, 10 in Arabic and one in English. There are no magazines of general interest, but only a number of small specialised periodicals and journals. The government does not own all of any one newspaper, but has a small percentage of shares in a number of them. Unlike in other Arab countries, such as Egypt and Lebanon, no regional editions of non-Jordanian newspapers are published in Jordan.

Advertising

The government has been criticized for its policy of advertising primarily in newspapers in which it owns shares.

Ownership

Although a law was enacted in 2000 that provided for the possibility of privately owned media, the government retained the right to license broadcast outlets, and has not yet issued licences for any private broadcast media. Also, there are yet no regulations providing for licence procedures or a licence board.

Media/Press laws

The 1998 Press and Publications Law granted the government wide discretionary powers to issue fines, withdraw licences, and order shutdowns, which enabled it to control the editorial

content of newspapers. However, the 1999 amendments to the Press and Publications Law limited to some extent the government's discretion to issue fines, transferred the power to withdraw licenses to the judiciary, limited significantly the government's power to order shutdowns, and allowed journalists to cover court proceedings unless the court ruled otherwise. The 1998 Press and Publications Law imposed strict limits on publications, which gave the government very broad leeway to sanction publications. According to the 1999 amendments, all publications must be licensed by the Government. The law also requires that the editor in chief of a newspaper be a citizen who permanently resides in the country and to have been a member of the JPA for at least 4 years.

In 2003, the government scrapped a controversial amendment to the kingdom's press law that imposed heavy penalties for a range of violations. The amendment adopted in October 2001 allowed for the 'permanent or temporary closure' of publications that carry 'false or libellous information that can undermine national unity or the country's reputation.'

Taxes

There are high taxes on the media industry and tariffs on paper, which some owners have claimed reduces the size of their publications.

Employment

The Press and Publications Law and the law governing the Jordan Press Association (JPA) require membership in the JPA for persons to be considered "legal" journalists or editors, thus potentially excluding dozens of practicing journalists from the profession. In 2002, the government selectively enforced this provision. The JPA used its authority to enforce bans on journalists receiving funding from foreign sources or having Israeli contacts. In 1999 then-Prime Minister Abdul Raouf Rawabdeh issued an order directing government offices to cooperate only with JPA members.

Jordanian government views editors-in-chief as high-ranking government officials. A number of editors-in-chief have become ministers of information or interior and have returned to their editorial positions after leaving their government posts.

Government-owned Jordan Television employs around 2,000 people. All employees in the radio and television companies must be appointed by the government and must pass a security evaluation.

Sources: CIA – *The World Factbook 2003*; *Freedom House*; *US State Department*; *Stanhope Centre UK*

POPULATION & MORE FACTS

Population by age and sex

	All individuals		Male		Female	
	000	%	000	%	000	%
0-14	1,960	36	1,001	35	959	37
15-64	3,305	61	1,764	62	1,541	59
65+	195	4	96	3	99	4
Total	5,460	100	2,861	100	2,599	100

Source: CIA - *The World Factbook 2003*

						Change (%)	
	1999	2000	2001	2002	2003	99/2003	2002/03
Number of titles							
Total dailies	5	5	-	5	-	-	-
Non-dailies	17	20	-	-	-	-	-

Source: UNESCO, WAN from public sources

Top dailies (2003)

Title
Al Arab al-Youm
Al Dustour (The Constitution)
Al-Ra'i
Jordan Times (in English)

Source: WAN from public sources

General economic situation

GDP total US\$120 billion; GDP per capita US\$7,158 (purchasing power parity; 2002). Consumer price index 106 (2002).

Performance of newspapers vs. other media

Many media outlets considered to be independent are controlled by holding companies which do not make public the names of their controlling investors. Several NGOs allege that most large media outlets are controlled by members of the president's family and close circle of friends through holding companies. However, according to government statistics, there were 1,431 mass media and information agencies in the country as of August 1, 2002, of which nearly 80% were privately owned.

The government controls nearly all broadcast transmission facilities. There are 77 independent television and 30 radio stations. There are only two government-owned, combined radio and television companies; however, they represent five channels and are the only stations that can broadcast nationwide. Regional governments own several frequencies; however, independent broadcasters have arranged with local governments to use the majority of these.

Performance of different types of newspapers

According to government statistics, there were 841 privately owned newspapers and 319 privately owned magazines in 2002, compared with 950 and 342, respectively, in 2001. According to an ICFJ print media adviser, there were 650 newspapers with an estimated aggregate weekly circulation of 2.5 million copies. The government ran one of the only two Russian-language national newspapers and the only Kazakh-language newspaper that appeared most frequently (five times a week). In addition, a number of privately owned media were believed to be controlled by members of the president's family. Each major city has at least one independent weekly newspaper.

Newspaper launches/closures

Two new, nationally circulated weeklies, published by the centrist opposition Ak Zhol political party, began operation in 2002.

In 2002, government controlled publishing houses refused to print several independent newspapers, amongst them *Respublika (Republic)*, *Vremya po (Time After)* and *SolDat (Soldier)*. Throughout February and March 2002, *Respublika* newspaper could not find printing presses in Almaty and Astana to publish it. In April, Almaty court suspended the newspaper for two months for violations of the Media Law's information disclosure requirement.

Media/Press Laws

The Media Law reaffirms the constitutional provision for free speech and prohibits censorship; however, the Media Law

enables the government to restrict media content. For example, amendments enacted in 2001 codify the constitutional prohibition on the mass media from undermining state security or advocating class, social, race, national, or religious superiority or "a cult of cruelty and violence." The amendments also establish that owners, editors, distributors, and journalists may be held civilly and criminally responsible for content, regardless of the source of information. The law also requires all media to register with the government, although websites were exempted from this requirement.

The Law on National Security gives the prosecutor general the authority to suspend the activity of news media that undermines national security; however, this authority has never been invoked. A 1999 State Secrets Law established a list of government secrets, the release of which is proscribed in the Criminal Code. The law defines, for example, certain foreign policy information as secret if disclosure of this information might lead to diplomatic complications for one of the parties. The list of state secrets enumerated in the law includes all information about the health, financial, and private life of the President and his family. Also defined as state secrets is economic information such as the volumes of national mineral reserves and the amount of government debt owed to foreign creditors.

The Media Law amendments, signed by the President in 2001, limit the rebroadcast of foreign-produced programming. The amendments required a graduated reduction in rebroadcast of foreign programming: 50 % beginning January 1 2002 and 20% by January 1, 2003.

The 1997 Language Law established that the amount of time television and radio stations broadcast in the state language (Kazakh) must not be less than the sum of the volumes of transmissions in other languages. The Ministry of Culture, Information, and Public Accord monitored compliance with this requirement and sanctioned some violators during the year with 6-month license suspensions.

A new Administrative Code, adopted in 2001, charges the Ministry of Culture with oversight over administrative violations of the media. The code allows the Ministry to suspend the activity of a media outlet for three days while preparing a legal case and to confiscate newspaper print runs.

State support

Many newspapers that are nominally independent, particularly Kazakh-language print media, receive government subsidies.

Sources: CIA – *The World Factbook 2003*; US State Department; *International Press Institute*; *George A Krimsky*; *ICFJ Print Media Adviser for Central Asia*

POPULATION & MORE FACTS

Population by age and sex

	All individuals		Male		Female	
	000	%	000	%	000	%
0-14	4,252	25	2,162	27	2,090	24
15-64	11,195	67	5,426	67	5,769	66
65+	1,317	8	458	6	859	10
Total	16,764	100	8,046	100	8,718	100

Source: CIA 2003

	Change (%)		
	2001	2002	2001/02
Number of titles			
Total newspapers	952	843	-11.45

Source: US State Department

Top dailies (2003)

Title	Circulation (000)		Format
	R	K	
Kazakhstanskaya Pravda (R)	-	-	
Yegemen Qazaqstan (K)	-	-	
Ekspress-K (R)	20		Broadsheet
Zhas Alash (K)	-	-	

Source: WAN

Due to a lack of available data, the majority of charts in this entry have not been updated since the 2002 edition of World Press Trends. Those that have not been updated clearly state the year to which the data relates.

POPULATION & MORE FACTS

Population by age and sex

	All individuals		Male		Female		Households 000
	000	%	000	%	000	%	
Children	13,100	43	6,419	43	6,681	43	6,100
15-19	3,600	12	1,764	12	1,836	12	
20-29	5,500	18	2,695	18	2,805	18	
30-49	3,300	11	1,617	11	1,683	11	
50+	4,900	16	2,401	16	2,499	16	
Total	30,400	100	14,896	100	15,504	100	

Source: Steadman & Associates/ZenithOptimedia projections

Population by social class

	All adults	
	000	%
AB	713	4
C1	2,071	13
C2	5,331	33
D	6,096	38
E	1,889	12
Total	16,100	100

Source: Steadman & Associates/
ZenithOptimedia projections

AB = fully qualified professional, senior manager, senior government, officer, professor, owner of large farm, graduate teacher.

C1 = junior/middle manager, foreman, senior clerk, qualified technician, owner/manager medium size farm, non-graduate teacher, qualified nurse.

C2 = skilled manual worker (mechanic, carpenter), junior clerks.

D = semi-skilled manual worker; house servant, waiter, shop assistant, game-scout.

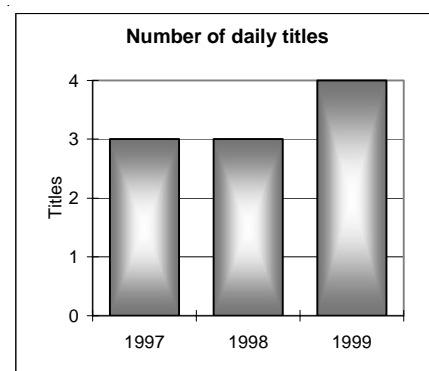
E = rural unskilled eg: labourer, rural watchman, sweeper, subsistence farmer.

Newspaper reach 1999 (%)

	Dailies	Weeklies
All adults	40.0	35.0

NUMBER OF TITLES AND CIRCULATION

	1997	1998	1999	2000	2001	Change (%)	
						1997/99	1998/99
Number of titles							
Total national dailies	3	3	4	-	-	33.33	33.33
Non-dailies	12	11	10	-	-	-16.67	-9.09
National non-dailies	7	7	6	-	-	-14.29	-14.29
Regional non-dailies	1	1	1	-	-	0.00	0.00
Local non-dailies	4	3	3	-	-	-25.00	0.00
Sundays	3	3	4	-	-	33.33	33.33
Circulation (000)							
Total national dailies	-	-	250	-	-	-	-
Non-dailies	-	-	110	-	-	-	-
National non-dailies	-	-	80	-	-	-	-
Regional non-dailies	-	-	30	-	-	-	-
Local non-dailies	-	-	-	-	-	-	-
Sundays	-	-	60	-	-	-	-



MORE FACTS

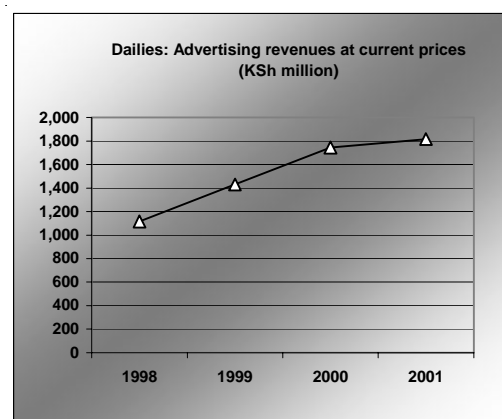
	1997	1998	1999	2000	2001	Change (%)	
						98/2001	2000/01
Advertising revenues (KSh million)							
All newspapers	-	1,116	1,430	1,745	1,817	62.81	4.13

Cover prices (1999)

	KSh
Single copy	25-30
Subscription	25-30

Newspaper colour capability & formats

Number of:	1997	1998	1999
4-colour newspapers	3	3	3
Tabloids	3	3	4





Top dailies (2001)

Title	Publisher	Circulation (000)	Readership (000)	Cover Price*		Format	Full page rate (KSh)	
				KSh	US\$		Mono	Colour
Daily Nation	Nation Media Group	170	3,100	30.00	0.38	Tabloid	210,870	280,870
East African Standard	Baraza Limited	70	698	30.00	0.38	Tabloid	186,840	242,840
Kenya Times	Kenya Times Media Trust	45	204	30.00	0.38	Tabloid	177,500	217,500
Taifa Leo	Nation Media Group	30	642	30.00	0.38	Tabloid	78,810	126,810

Source: ZenithOptimedia

*1999 data

Top ten advertising categories (2000)

Advertising sector	Newspaper expenditure KSh (000)
Media	485,551
Transport	188,166
Household	177,168
Office equipment	133,081
Finance/insurance	128,651
Retail	106,985
Beverages	101,263
Tourism/entertainment	81,763
Foods	74,374
Hygiene/cosmetics	38,980

Source: Steadman & Associates

Top ten advertisers (2000)

Advertiser	Newspaper expenditure KSh (000)
Uchumi Supermarkets	26,846
Nation TV	20,807
KTN TV	18,940
Nakumatt Supermarkets	14,096
East African Standard	13,286
Nation/Taifa Competition	10,583
Taifa Leo	10,573
Kenya Building Society	10,462
Nation FM	9,054
Daily Nation	8,115

Source: Steadman & Associates

Top publishing companies (1999)

(ranked by total circulation)

Nation Media Group
Baraza Limited/Standard Newspapers
Kalamka Limited
Kenya Times Media Trust

ADVERTISING EXPENDITURE & ECONOMIC DATA

Advertising expenditure

(KSh millions, in current prices)

	1994	1995	1996	1997	1998	1999	2000	2001
Newspapers	601	806	962	864	1,116	1,430	1,745	1,817
Magazines	65	91	182	189	217	172	120	172
Television	585	586	910	918	868	894	926	1,231
Radio	373	366	494	675	868	885	1,401	1,735
Cinema	0	18	52	54	31	24	32	43
Total	1,624	1,867	2,600	2,700	3,100	3,405	4,224	4,998

Source: ZenithOptimedia

Notes: Before discounts, excludes classified and production costs, includes agency commission.

Main economic indicators 1995-2001

	1995	1996	1997	1998	1999	2000	2001
1 US\$=	78.75	KSh at 2002 rate					
Gross Domestic Product (KSh billion)							
at current prices	466	529	623	691	742	796	895
% change	16.2	13.5	17.9	10.9	7.4	7.3	12.5
at 2001 prices	741	772	818	850	863	841	895
% change	21.9	4.3	5.9	3.9	1.5	-2.5	6.4
Gross Domestic Product per capita (KSh 000)							
at current prices	15.3	16.6	21.9	23.5	24.7	26.0	28.6
at 2001 prices	24.3	24.3	28.8	29.0	28.7	27.4	28.6
Population							
Millions	30.5	31.8	28.4	29.3	30.0	30.7	31.3
Consumer Price Index							
2001=100	62.9	68.4	76.2	81.3	86.0	94.6	100.0
%change	0.8	8.9	11.3	6.7	5.8	10.0	5.7
Ad.spend as a % of GDP							
	0.40	0.49	0.43	0.45	0.46	0.53	0.56
Advertising Expenditure Growth (%)							
at current prices	15.0	39.3	3.8	14.8	9.8	24.1	18.3
at 2001 prices	14.1	27.9	-6.7	7.6	3.8	12.8	11.9

Source: IFS, ZenithOptimedia

Research

Circulation is audited by: Audit Bureau of Circulation

Taxes

No exemptions for tax are available. Tax on newsprint and other publishing inputs (computer, presses, etc.) is high.

Ownership

Does any law exist governing publishing-house ownership, or the registration of shares in newspaper-publishing companies? The Books and Newspapers Act restricts publishing without registration and security bond. Title and copies of each edition of a publication must be submitted to the registrar.

Is there any law prohibiting or restricting foreign companies or individuals from owning shares, and in particular, the majority of shares, of domestic daily newspapers? Yes. Foreigners can be leading shareholders but cannot own a media company outright, or any other company incorporated locally.

Is there any law prohibiting daily newspaper or periodical publishers from operating radio or television stations in the same locality? No. But the proposed Media Commission Bill intends to restrict cross media ownership or limit it to less than controlling stake.

So as to guarantee disclosure and transparency in the capital structure and to avert silent partnerships, is there a law or rule making it possible to determine who actually owns a publishing company? No

Is there an antitrust law limiting concentration in the daily press? No, but the above-mentioned Media Commission Bill will apply.

Is further regulation of media concentration expected? No, other than the Media Commission Bill.

General economic situation

GDP total US\$79 million (2001; supplemented by nearly equal amount from external sources); GDP per capita US\$806 (purchasing power parity; 2001). Consumer price index 102.5 (2001).

Performance of newspapers vs. other media

The sole AM and sole FM radio stations in Tarawa are government-owned; Radio Kiribati (AM) broadcasts live national news and entertainment as well as hourly Radio Australia and Voice of America programming. The government FM station relayed a continuous feed from BBC Radio. In 1999 an opposition attempt to operate a private radio station was blocked when the government closed the station and fined the owners for attempting to import broadcasting equipment without a licence. The station owner instituted legal action, and New Air FM was issued a government licence in December. The former president owns this station and the only regularly published private newspaper. High costs limited the availability of foreign print media and Internet access, but there were no government-imposed limitations.

Performance of different types of newspapers

Two main newspapers in Kiribati are weeklies. *Te Uekera* is a government-owned newspaper with circulation of 1,800 copies, most of which are being sold in Tarawa, the main

urban area. A copy costs 60 Australian cents. *Te Uekera* is written both in the local language Tihe and English. The *Kiribati Newstar* is the atoll nation's first independent newspaper, launched by former president and current opposition parliamentarian, Ieremia Tabai. It is written in I-Kiribati and sometimes carries some stories in English. A copy also costs 60 Australian cents. The circulation of the *Kiribati Newstar* reaches that of *Te Uekera*. Churches publish newsletters and other periodicals.

Media/press laws

Under the 1988 Newspaper Registration Act, newspapers are required to register with the government. In October 2002, the legislature amended the act to give the government the authority to deregister a newspaper if the publication was found to have published material deemed to be offensive to good taste, decency, or public feeling, or likely to encourage or incite crime. The amendment also required newspapers to ensure that, in an article affecting the "credibility or reputation of any person," the affected individual can respond in the same article. Fines of US\$286 (A\$500) may be assessed for each violation of these provisions. As of year's end, no publications had been deregistered or prevented from publishing.

Sources: CIA – *The World Factbook 2003*; US State Department; Australian Press Council

POPULATION

Population by age and sex

	All individuals		Male		Female	
	000	%	000	%	000	%
0-14	39	40	20	41	19	39
15-64	56	57	28	57	28	57
65+	3	3	1	2	2	4
Total	98	100	49	100	49	100

Source: CIA - *The World Factbook 2003*

KOREA, NORTH

General economic situation

GDP total US\$22.26 billion; GDP per capita US\$991 (purchasing power parity; 2002). Consumer price index not available.

Performance of newspapers vs. other media

Domestic media censorship was enforced strictly, and no deviation from the official government line was tolerated. The regime prohibited listening to foreign media broadcasts except by the political elite, and violators were subject to severe punishment. Radios and television sets received only domestic programming; radios obtained from abroad were required to be submitted for alteration to operate in a similar manner. CNN television broadcasts were only available in a Pyongyang hotel frequented by foreigners.

Performance of different types of newspapers

The main newspapers represent organs of Korean Workers' Party The People's Korea, government and trade unions. The press mainly consists of flattering reports about Kim Jong-Il and his daily agenda. North Korea's economic hardships or devastating famine are not reported.

Online/digital publishing

Although North Korea has the internet domain name .kp, no website created and run in the country has been found. North Koreans have neither the right nor the means to access the Internet.

Media/press laws

The penal code cites listening to foreign broadcasts and possessing dissident publications as 'crimes against the state,' which are punishable by death.

Foreign journalists

Although more foreign journalists have been allowed into the country in 2001 and 2002, their movements within the country remain closely monitored and highly restricted.

Sources: CIA – *The World Factbook 2003*; US State Department; Freedom House; BBC News

POPULATION & MORE FACTS

Population by age and sex

	All individuals		Male		Female	
	000	%	000	%	000	%
0-14	5,610	25	2,846	26	2,764	24
15-64	15,232	68	7,485	69	7,747	67
65+	1,625	7	541	5	1,084	9
Total	22,467	100	10,872	100	11,595	100

Source: CIA - *The World Factbook 2003*

Top dailies (2003)

Title	Publisher
Rodong Sinmun (Labour Daily)	Korean Workers' Party The People's Korea
Joseon Inmigung (Korea People's Army daily)	-

Source: BBC News

KOREA, REPUBLIC OF

POPULATION

Population by age and sex (2000)

	All individuals		Male		Female		Households 000
	000	%	000	%	000	%	
0-14	9,639	21	5,088	22	4,551	20	14,311
15-24	7,540	16	3,942	17	3,598	16	
25-34	8,191	18	4,126	18	4,065	18	
35-44	8,183	18	4,147	18	4,036	18	
45-54	5,302	12	2,681	12	2,621	11	
55-64	3,757	8	1,796	8	1,961	9	
65+	3,371	7	1,287	6	2,084	9	
Total	45,983	100	23,067	100	22,916	100	

Source: National Statistical Office (2000)

Households

Occupancy	Households	
	000	%
1 person	2,224	16
2 people	2,731	19
3 people	2,987	21
4 people	4,447	31
5 or more people	1,922	13
Total	14,311	100

Source: National Statistical Office 2000

Labour force by social class

	Individuals	
	000	%
A	4,527	21
B	3,150	14
C	5,717	26
D	1,409	6
E	7,133	33
Total	21,936	100

Source: National Statistical Office 2004

A=higher managerial, administrative, professional

B=clerical, office worker

C=service, sales worker

D=agriculture, forestry, fishery

E=technical, unskilled

Newspaper reach 2001 (%)

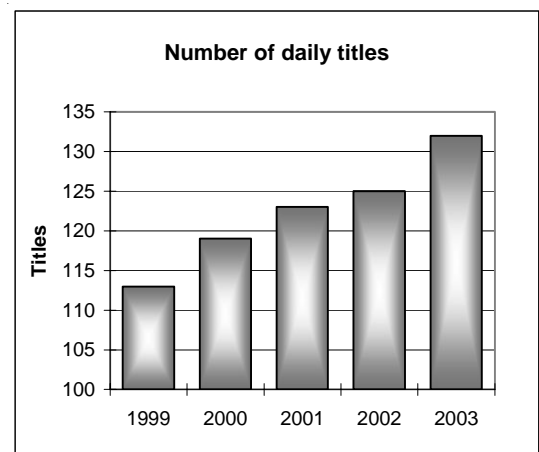
	Daily
All adults	50
Housewives	43

Source: HRC Media Index

NUMBER OF TITLES AND CIRCULATION

	1999	2000	2001	2002	2003	Change (%)	
						99/2003	2002/03
Number of titles							
Total dailies	113	119	123	125	132	16.81	5.60
Total non-dailies	5,318	4,708	4,647	-	-	-	-
<i>Weeklies</i>	1,999	2,222	2,177	-	-	-	-
<i>Monthlies</i>	3,319	2,486	2,470	-	-	-	-

Source: Ministry of Culture and Tourism (MCT)

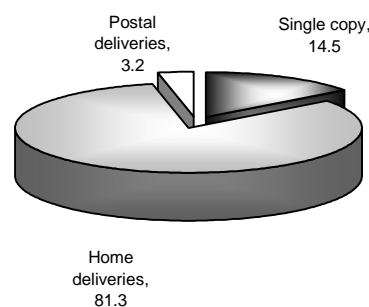


MORE FACTS

Type of newspaper sales (%)

	Single copy	Home deliveries	Postal deliveries
1999	7.3	91.5	1.1
2000	10.2	87.8	2.0
2001	8.5	86.6	4.9
2002	-	-	-
2003	14.5	81.3	3.2

Type of newspaper sales in 2003 (%)



Distribution and newsprint costs

	2002
Newsprint costs (average per ton)	
Won	972,230

**Online readership** (page impressions per month, 000)

Newspaper	1998	1999	2000
Chosun Ilbo	124,000	265,000	720,000
Hankook Ilbo	171,000	281,000	422,000
Joongang Ilbo	118,660	203,000	228,000
Dong-A Ilbo	35,820	57,310	220,000
Maeil Business Newspaper	20,000	55,000	210,000

Internet publishing (No. of online editions)

	1997	1998	1999	2000	2001
Dailies	27	32	52	53	68

Top ten dailies (2003)

Title	Publisher	Circulation * (000)	Format	Full page rate (Won 000s)	
				Mono	Colour
The Chosun Ilbo	Sang-Hoon Bang	2,372	Broadsheet	41,620	72,100
Joongang Ilbo	Seok-Hyun Hong	2,084	Broadsheet	22,200	44,400
The Donga Ilbo	Hak-Jun Kim	2,062	Broadsheet	22,200	61,050
The Hankook Ilbo	Sang-Suk Shin	-	Broadsheet	41,400	72,000
Maeil Business Newspaper	Dae-Whan Chang	-	Broadsheet	-	-
The Korean Economic Daily	Sang-Min Shin	-	Broadsheet	-	-
Ilgan Sports	Joong-Ho Chang	-	Broadsheet	-	-
The Seoul Shinmun	Soo-Sam Chae	-	Broadsheet	-	-
Sports Seoul	Haeng-Soo Kim	-	Broadsheet	11,563	13,875
The Hankyoreh	Hee-Bum Koh	-	Broadsheet	18,500	22,200

* The Chosun Ilbo, Joongang Ilbo and Donga Ilbo are the only title independently audited by Korean ABC; all other circulation figures are publishers' claims and are often disputed

Top ten advertising categories (2002)

Category	% of display ad revenue
Services	17.8
IT	11.6
Construction & property	9.7
Publishing	8.9
Distribution	7.0
Finance/stocks/insurance	6.0
Government & organisations	4.8
Food	4.7
Education & welfare	4.5
Pharmaceuticals	4.4

Source: Korea Advertising Data (KADD)

Top ten newspapers (2002)

ranked by total revenue	Circulation	Won (mill)
The Chosun Ilbo	2,371,920	481,743
Joongang Ilbo	2,084,253	417,448
The Donga Ilbo	2,061,928	374,965
The Hankook Ilbo	-	224,887
Maeil Business Newspaper	-	168,450
The Korean Economic Daily	-	124,321
Ilgan Sports	-	99,222
The Seoul Shinmun	-	97,817
Sports Seoul	-	94,885
The Hankyoreh	-	81,777

Source: Financial Supervisory Service (2002),
Audit Bureau of Circulations (2003. 4-9)

Top ten advertisers (2003)

Advertiser	Expenditure Won (000)
Samsung Electronics	73,891,268
SK Telecom	46,228,500
LG Electronics	39,450,688
Lotte Department Store	38,718,053
KT	34,686,157
HP	31,699,537
Yuhan Corporation	29,870,809
Hyundai Motors	26,148,025
Kia Motors	24,349,035
Daewoo Engineering & Construction	23,356,785

Source: Korea Advertising Data (KADD)

Employment (in 123 newspapers and two news agencies)

	1999	2000	2001	2002	2003
Total no. of journalists	6,844	-	-	-	-
Total no. of employees	15,670	14,664	15,073	15,139	14,849

Cover prices

	Won
Single copy	400-600
Monthly subscription	8,000-12,000

Media consumption (minutes per day)

	1996	1998	2000	2002
Newspapers	43.5	40.8	35.1	37.3
Magazines	11.8	7.6	10.5	13
Radio	72.9	68.3	61.2	70.6
Television	172	193.6	174.1	163.7
Internet	-	30.4	42.2	77

Source: Korea Press Foundation

Contribution of classified, display and insert advertising to total advertising income (%)

	2002
Display	87.0
Classified	11.9
Inserts	1.1



CROSS MEDIA OWNERSHIP

Owners	Regional TV	National TV	Regional newspapers	National newspapers	Radio
Regional TV licensees	No limit	Forbidden	Forbidden	Forbidden	No limit
National TV licensees	Forbidden	No limit	Forbidden	Forbidden	No limit
Regional newspaper owners	Forbidden	Forbidden	No limit	No limit	No limit
National newspaper owners	Forbidden	Forbidden	No limit	No limit	No limit
Satellite TV Broadcasters	Forbidden	Forbidden	No limit	No limit	No limit
Local radio licensees	Forbidden	Forbidden	No limit	No limit	No limit
National radio licensees	Forbidden	Forbidden	No limit	No limit	No limit
Foreign investors	Forbidden	Forbidden	Max. 30%	Max. 30%	Forbidden

ADVERTISING EXPENDITURE & ECONOMIC DATA

Main economic indicators 1996-2002

	1996	1997	1998	1999	2000	2001	2002
1 US\$=	1,251	Won at 2002 rate					
Gross Domestic Product (Won billion)							
at current prices	418,479	453,276	444,367	482,744	521,959	551,558	596,381
% change	10.9	8.3	-2.0	8.6	8.1	5.7	8.1
at 2002 prices	518,212	537,086	490,011	527,849	558,045	566,831	596,381
% change	5.7	3.6	-8.8	7.7	5.7	1.6	5.2
Gross Domestic Product per capita (Won 000)							
at current prices	9,189	9,856	9,571	10,302	11,040	11,651	12,598
at 2002 prices	11,379	11,678	10,554	11,264	11,803	11,974	12,598
Population							
Millions	45.5	46.0	46.4	46.9	47.3	47.3	47.3
Consumer Price Index							
2002=100	80.8	84.4	90.7	91.5	93.5	97.3	100.0
% change	4.9	4.5	7.5	0.8	2.3	4.0	2.8
Ad.spend as a % of GDP							
	1.29	1.35	0.98	1.13	1.38	1.14	1.26
Advertising Expenditure Growth (%)							
at current prices	17.8	13.4	-28.6	25.3	32.0	-12.7	19.3
at 2002 prices	12.3	8.5	-33.6	24.3	29.0	-16.1	16.1

Source: IFS, ZenithOptimedia

Advertising expenditure

(Won millions, in current prices)

	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
Newspapers	2,060,826	2,872,643	2,297,975	2,907,606	3,570,000	2,758,700	3,184,328	3,248,015	3,377,936	3,546,833	3,759,643
Magazines	207,475	240,923	167,539	218,985	297,500	284,600	329,029	335,609	352,389	377,056	407,220
Television	1,591,476	1,555,005	1,049,898	1,532,773	2,242,200	2,118,900	2,673,900				
Radio	216,619	189,031	110,297	145,895	250,400	237,200	278,000				
Others	1,319,019	1,258,721	739,764	584,286	722,700	775,500	872,000				
Total	5,395,415	6,116,323	4,365,473	5,470,745	7,435,900	6,303,000	7,522,257	7,890,094	8,412,729	9,037,110	9,763,257

Source: 1996-2002 Korea Advertising Data, 2003-2006 ZenithOptimedia

Notes: Discounts not given, includes agency commission and classifieds, excludes production costs, others' includes cinema, outdoor and direct mail.

Taxes

VAT on:	sales 0	advertising 10%
	newsprint 10%	plant 10%
	composition 10%	(standard VAT rate 10%)

POPULATION & MORE FACTS

Population by age and sex

	All individuals		Male		Female		Households 000
	000	%	000	%	000	%	
0-14	597	28	304	24	293	35	231
15-64	1,461	69	934	73	527	63	
65+	53	3	34	3	19	2	
Total	2,112	100	1,272	100	839	100	

Source: CIA

Top dailies (2001)

Title	Circulation (000)	Readership (000)	Full page rate (US\$)	
			Mono	Colour
Al Anba	116	397	5,940	9,900
Al Watan	86	390	6,000	10,000
Al Qabas	79	229	6,800	11,200
Al Rai Al Aam	43	128	6,800	11,200
Arab Times	34	90	5,597	9,795
Kuwait Times	32	62	5,280	10,560

Source: PARC

Top ten advertising categories (2001)

Advertising sector	Newspaper expenditure US\$ (000)
Retail stores	23,306
Professional services	21,689
Road vehicles	18,934
Government ads	12,162
Publishing/media	11,286
Financial services	11,074
Restaurants/hotel/clubs	7,852
Entertainment	6,387
Organisation ads	5,157
Community & public services	4,817

Source: PARC

Top ten advertisers (2001)

Advertiser	Newspaper expenditure US\$ (000)
News week	1,764
Toyota	1,577
Misc. prof. services	1,293
Nissan	1,275
Ford	1,143
Mitsubishi	1,021
Kentucky	990
McDonald's	833
Nokia	790
Showtime	746

Source: PARC

ADVERTISING EXPENDITURE & ECONOMIC DATA

Advertising expenditure (US\$ millions, in current prices)

	1995	1996	1997	1998	1999	2000	2001	2002
Newspapers	74.0	83.6	99.7	106.3	114.2	136.9	163.6	195.8
Magazines	26.0	32.6	35.5	34.2	36.2	34.6	35.5	39.2
Television	14.8	28.6	15.8	19.7	11.2	11.8	9.2	8.2
Radio	-	2.0	3.0	3.0	3.0	3.0	2.3	3.0
Outdoor	-	-	6.3	7.9	9.9	17.1	24.7	33.9
Total	114.9	146.8	160.3	171.1	174.4	203.4	235.3	280.1

Source: PARC

Notes: Before discounts, includes agency commission, excludes classified and production costs

Main economic indicators 1996-2002

	1996	1997	1998	1999	2000	2001	2002
1 US\$=	0.30	Dinar at 2002 rate					
Gross Domestic Product (Dinar million)							
at current prices	9,303	9,060	7,656	8,884	11,357	10,496	10,738
% change	17.4	-2.6	-15.5	16.0	27.8	-7.6	2.3
at 2002 prices	10,131	9,808	8,272	9,322	11,699	10,637	10,738
% change	13.3	-3.2	-15.7	12.7	25.5	-9.1	0.9
Gross Domestic Product per capita (Dinar)							
at current prices	4,922	4,576	3,771	4,210	5,186	5,328	5,451
at 2002 prices	5,360	4,953	4,075	4,418	5,342	5,400	5,451
Population							
Millions	1.9	2.0	2.0	2.1	2.2	2.0	2.0
Consumer Price Index							
2002=100	91.8	92.4	92.6	95.3	97.1	98.7	100.0
%change	3.6	0.6	0.2	3.0	1.9	1.6	1.3
Ad.spend as a % of GDP							
	0.48	0.54	0.68	0.60	0.54	0.68	0.79
Advertising Expenditure Growth (%)							
at current prices	27.8	9.2	6.8	1.9	16.6	15.7	19.0
at 2002 prices	23.4	8.5	6.6	-1.0	14.5	13.8	17.4

Source: IFS, ZenithOptimedia

Due to a lack of available data, the majority of charts in this entry have not been updated since the 2002 edition of World Press Trends. Those that have not been updated clearly state the year to which the data relates.

General economic situation

GDP total US\$13.88 billion; GDP per capita US\$2,837 (purchasing power parity; 2002). Consumer price index 102.1 (2002).

Performance of newspapers vs. other media

In 2002, more than 400 mass media outlets were registered in the country but only several dozen of them operated regularly. Nearly 70% of all media are in private hands. Some news outlets are owned and controlled partly or fully by individuals with close ties to the government. Kyrgyz State TV and Radio Corporation broadcasts every day from Bishkek, covering the whole country. There are more than 30 registered non-governmental television and radio stations, most of them in Bishkek. Two television stations in Osh broadcast in Uzbek: Osh Television, which broadcast in Uzbek part of the time, and Mezon Television, all of whose programs are in Uzbek. The latter was founded by the Mezon Uzbek Ethnic Center to serve the needs of the large Uzbek population in Osh.

Performance of different types of newspapers

According to the US State Department, there are approximately 25 to 30 newspapers and magazines with varying degrees of independence, including some that have only local circulation. According to an ICFJ print media advisor, there are 75 newspapers with total aggregate weekly circulation of 425,000 copies in 2002. The state printing house Uchkun is the primary newspaper publisher in the country, with several small presses located inside and outside of the capital. There are two main governmental newspapers, one written in Russian and the other one in Kyrgyz. Local administrations publish 48 regional newspapers, 11 city newspapers and 11 area newspapers. Most of them are weeklies with circulation from 1,000 to 4,000 copies. Only three newspapers offered an independent viewpoint, the Kyrgyz-language *Asaba*, and two Russian-language newspapers, *Moya Stolitsa-Novosti*, and the weekly *Delo No*. *Asaba* was financially ruined in 2000 by a series of multi-million Som suits brought by high-level officials with the paper then passing into the hands of pro-government businessmen. In 2002, *Moya Stolitsa-Novosti* faced 37 lawsuits with damages and fines.

Newspaper launches/closures

In 2002, the state printing house Uchkun stopped printing two independent newspapers, *Moya Stolitsa* and *Res Publica*, following publication of articles critical of the government and the president's family. The printing house claimed the printing was stopped due to an unsigned servicing agreement with the newspaper. Uchkun initially refused to print *Moya Stolitsa*, but when *Res Publica* offered their printing run to *Moya Stolitsa*, Uchkun refused to print either paper. In 2002,

Uchkun also threatened not to publish an issue of the independent newspaper *Aalam* because it contained material critical of the President's son. Once the article was removed, the issue was printed.

In 2003, the independent weekly newspaper *Jani Zaman* ('New Time') was launched in Osh, Jalalabad and Batken areas. The initial circulation was 3,000 copies. The newspaper is written in Kyrgyz, Uzbek, English and Russian. The project is financed with assistance of Fund 'Soros-Kyrgyzstan.'

Circulation

Unlike state-sponsored media, few private outlets reach a national audience.

Media/press laws

All media are required to register with the Ministry of Justice and wait for ministry approval before beginning to operate. The Media Law states that the registration process should require one month.

The law on the mass media prohibits the dissemination of government and commercial secrets; material advocating war, violence, or intolerance toward ethnic or religious groups; desecration of national norms, ethics, and symbols (such as the national seal, flag, or anthem); pornography; and encroachment on the honour and dignity of a person (libel). Libel is a criminal, not a civil, action.

Distribution

In 2002, militia at Toktogul seized 2,500 copies of *Kyrgyz Ordo* with articles critical of President Akayev as they were being shipped south for distribution.

State support

Government newspapers, television and radio continued to receive government subsidies.

Printing plants

In 2003, a US-funded printing plant was set up in Kyrgyzstan, with the capacity to produce as many as 18,000 newspapers per hour. Located in a run-down suburb of the capital Bishkek the plant will also seek contracts in other, more hardline ex-Soviet neighbours, such as Uzbekistan and Turkmenistan. The US State Department has provided one million dollars (€900,000) in funding for the project. Additional funding is being provided by Norway and philanthropist George Soros' Open Society Institute.

Sources: CIA – *The World Factbook 2003*; Freedom House; US State Department; George A. Krimsky, ICFJ Print Media Adviser for Central Asia; CASCFEN; AFP

POPULATION

Population by age and sex

	All individuals		Male		Female	
	000	%	000	%	000	%
0-14	1,657	34	837	35	820	33
15-64	2,929	60	1,436	60	1,493	60
65+	307	6	117	5	190	8
Total	4,893	100	2,390	100	2,503	100

Source: CIA - *The World Factbook 2003*

Newspaper reach (%)

	Newspaper reach (%)	
	Daily	Weekly
All adults	28.6	71.4
Men	32.1	85.5
Women	25.4	58.5

Source: *Vecherny Bishkek*



NUMBER OF TITLES

	1999	2000	2001	2002	2003	Change (%)	
						99/2003	2002/03
Number of titles							
Total dailies	3	3	-	-	-	-	-
Non-dailies	164	181	-	-	-	-	-

MORE FACTS

Contribution of classified, display and insert advertising to total advertising income (%)

1999	
Display	54.2
Classified	45.8
Inserts	0.0

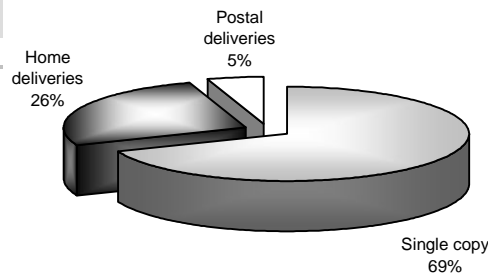
Newsprint costs (average per ton)

1999	
Soms	23,000
Euros	500

Type of newspaper sales (%)

	Single copy	Home deliveries	Postal deliveries
1999	69	26	5

Type of newspaper sales in 1999 (%)



Newsprint costs (average per ton)

1999	
Soms	23,000
Euros	500

Top dailies (2003)

Title	Circulation (000)	Format
Vecherni Bishkek	25	Tabloid
Res Publica	-	-

Source: WAN from public sources

Internet publishing (No. of online editions)

1999	
Dailies	1

Employment & salary

1999	
Total no. of Journalists	51
Total no. of Employees	121
Total salary costs	Som (000s) 11,792

Online readership (page impressions per month)

1999	
Newspaper	
Vecherny Bishkek (vb.kyrnet.kg)	102,468

Source: Vecherny Bishkek

Cover prices (1999)

Som	
Single copy	Tues, Thurs: 1.20 Mon, Wed: 2.40 Fri: 4.20
Subscription (postal)	1.17
Subscription (hand)	1.74

Top ten advertising categories (1999)

Advertising sector
Property sales
Property exchange
Property rental
Services
Vacancies
Auto
Auto parts & equipment
Food
Pets
Miscellaneous

Source: Rubicon

Top ten publishing companies (1999)

(ranked by total circulation)
Vecherny Bishkek
Delo No
Asaba
Slovo Kyrgyzstan
KTR-obo
Blitz-info
RIF
Absolute-Express
ResPublica
Limon

Source: Vecherny Bishkek

Top ten advertisers (1999)

Advertiser	Newspaper expenditure (Som)
Soros-Kyrgyzstan Foundation	979,943
KATEL	599,230
Philip Morris	590,850
Central Asian Corporation	550,000
Glavtur	402,849
Tolubay	357,124
Economy development fund	252,000
Areopag	250,000
Kairat	250,000
Payroll Saving Company	180,000

Source: Rubicon



ADVERTISING EXPENDITURE & ECONOMIC DATA

Main economic indicators 1993-1999

	1993	1994	1995	1996	1997	1998	1999
1 US\$=	39.01						
	Soms at 1999 rate						
Gross Domestic Product (Soms billion)							
at current prices	5.4	12.0	16.1	22.5	30.7	34.2	-
% change	-	124.5	34.3	39.2	36.6	11.4	-
at 1999 prices	-	-	39.5	41.6	46.1	46.5	-
% change	-	-	-	5.5	10.6	0.9	-
Gross Domestic Product per capita (Soms 000)							
at current prices	1.2	2.7	3.6	4.9	6.6	7.4	-
at 1999 prices	-	-	8.8	9.1	9.9	10.0	-
Population							
Millions	4.5	4.5	4.5	4.6	4.6	4.6	4.6
Consumer Price Index							
1999=100	-	-	40.9	53.9	66.6	73.6	100.0
%change	-	-	-	31.9	23.5	10.4	35.9

Source: IFS, ZenithOptimedia

LAOS

POPULATION & MORE FACTS

Population by age and sex

	All individuals		Male		Female		Households
	000	%	000	%	000	%	
0-14	2,453	42	1,234	43	1,220	42	850
15-64	3,135	54	1,543	54	1,591	55	
65+	189	3	86	3	103	4	
Total	5,777	100	2,866	100	2,912	100	

Source: CIA

Top ten advertisers (2002)

Advertiser
Lao Beer
Lao Pepsi
Lao Pharmaceutical Factory no.2
PSI Number One Condom
Lao Steel Products
Lao Insurance
Hotels & Restaurants
Lao Telecom
Computers
Toyota/Kolao

Source: Lao Press

Top ten advertising categories (2002)

Advertising sector
Lao Beer
Lao Pepsi
PSI Number One Condom
Lao Pharmaceutical Factory no.2
Lao Insurance
Hotels & Restaurants
Import-Export Companies
Consulting & Construction Companies
Lao Cement
Lao Mineral Water

Source: Lao Press

Newspaper reach (%)

	Daily
All adults	21
MHS	23

Source: Ariya

MHS: Main Household Shopper

Top dailies (2002)

Title	Circulation (000)	Full page rate (US\$) Mono
Pasason Daily	12	495
Pathet Lao	1.2	-

Source: Lao Press

ADVERTISING EXPENDITURE & ECONOMIC DATA

Main economic indicators 1996-2002

	1996	1997	1998	1999	2000	2001	2002
1 US\$=	8,954.6						
	Kip at 2002 rate						
Gross Domestic Product (Kip billion)							
at current prices	1,726	2,200	4,240	10,329	13,671	15,670	18,259
% change	21.6	27.5	92.7	143.6	32.4	14.6	16.5
at 2002 prices	14,323	14,319	14,450	15,409	16,305	17,335	18,259
% change	7.6	0.0	0.9	6.6	5.8	6.3	5.3
Gross Domestic Product per capita (Kip 000)							
at current prices	360	447	843	2,002	2,619	2,902	3,381
at 2002 prices	2,984	2,910	2,873	2,986	3,124	3,210	3,381
Population							
Millions	4.8	4.9	5.0	5.2	5.2	5.4	5.4
Consumer Price Index							
2002=100	12.0	15.4	29.3	67.0	83.8	90.4	100.0
%change	13.0	27.5	91.0	128.5	25.1	7.8	10.6
Ad.spend as a % of GDP							
	0.12	0.20	0.30	0.30	0.27	0.29	0.30
Advertising Expenditure Growth (%)							
at current prices	47.3	58.9	8.6	13.9	8.5	6.4	8.0

Source: IFS, ZenithOptimedia

Advertising expenditure (US\$ 000, in current prices)

	1995	1996	1997	1998	1999	2000	2001	2002
Newspapers	330	580	1,020	1,180	1,380	1,570	940	1,030
Magazines	-	-	-	-	-	-	800	850
Television	750	960	1,490	1,600	1,810	2,000	2,090	2,270
Radio	50	110	250	300	370	420	460	540
Cinema	15	22	40	40	40	50	50	50
Outdoor	350	530	700	680	730	660	660	660
Total	1,495	2,202	3,500	3,800	4,330	4,700	5,000	5,400

Source: Ariya

Notes: Before discounts, includes agency commission, excludes classified and production costs

POPULATION

Population by age and sex

	All individuals		Male		Female		Households 000
	000	%	000	%	000	%	
0-15	411	18	210	20	201	16	886
16-24	314	13	160	15	154	12	
25-34	322	14	161	15	160	13	
35-44	339	15	165	15	174	14	
45-54	310	13	144	13	166	13	
55-64	267	11	114	11	153	12	
65+	370	16	120	11	250	20	
Total	2,332	100	1,073	100	1,258	100	

Source: CSB of Latvia

Population by social class and sex

	All adults		Male		Female	
	000	%	000	%	000	%
A+B	590	32	275	32	315	32
C1	231	12	108	12	123	12
C2	618	33	289	33	329	33
D	148	8	69	8	79	8
E	276	15	129	15	147	15
Total	1,863	100	870	100	993	100

Source: Latvian Statistics Bureau

A+B= managerial

C1= specialists, clerks

C2= blue collar workers

D= self-employed

E= retired, unemployed

Households

Occupancy	Households	
	000	%
1 person	208	23
2 people	269	30
3 people	202	23
4 people	133	15
5 or more people	74	8
without children	601	68
with children	285	32
with youngest child aged 0-3	72	8
with youngest child aged 4-9	89	10
with youngest child aged 10-15	124	14
Total	886	100

Source: Household Budget Survey

Housewives (co-habiting persons)

	Housewives	
	000	%
under 25	14	20
25-34	25	36
35-44	19	27
45-54	12	17
55-64 *	1	1
over 65 *	0	0
Total	70	100

Source: Population and Housing Census

* note: most people aged over 60 are classed as 'pension recipients', not housewives

Age structure of readership

Age	% of readership	% daily reach within age group
15-24	17.8	47.9
25-34	19.1	53.8
35-44	18.9	52.4
45-54	17.9	53.8
55-64	14.3	50.5
65-74	12.0	47.0

Source: National Readership Survey
November 2002-October 2003

Newspaper reach (%)

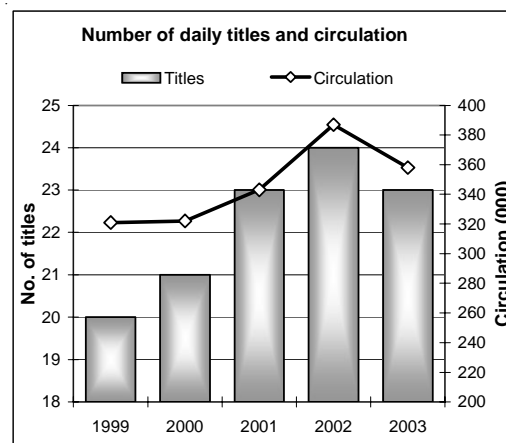
	Daily
All adults	51.0
Men	52.9
Women	49.4
MHS	51.9

Source: National Readership Survey
November 2002-October 2003
MHS = Main Household Shopper

NUMBER OF TITLES AND CIRCULATION

	1999	2000	2001	2002	2003	Change (%)	
						99/2003	2002/03
Number of titles							
Total dailies	20	21	23	24	23	15.00	-4.17
National dailies	12	13	15	16	15	25.00	-6.25
Regional dailies	8	8	8	8	8	0.00	0.00
Non-dailies	62	60	64	65	71	14.52	9.23
National non-dailies	30	28	31	28	31	3.33	10.71
Regional non-dailies	31	31	31	33	33	6.45	0.00
Free non-dailies	1	1	2	4	7	600.00	75.00
Circulation (000)							
Total dailies	321	322	343	387	358	11.53	-7.49
National dailies	262	265	290	333	302	15.27	-9.31
Regional dailies	59	57	53	54	56	-5.08	3.70
Non-dailies	905	849	884	811	766	-15.36	-5.55
National non-dailies	449	388	426	344	356	-20.71	3.49
Regional non-dailies	206	208	193	204	198	-3.88	-2.94
Free non-dailies	250	253	265	263	212	-15.20	-19.39
Total annual sales (millions of copies)							
Dailies	65	65	73	81	80	23.08	-1.23
Non-dailies	54	47	44	40	39	-27.78	-2.50

Source: Latvian Press Publishers Association

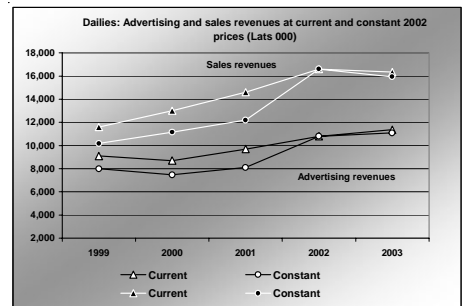




MORE FACTS

	1999	2000	2001	2002	2003	Change (%)	
						99/2003	2002/03
Advertising revenues (Lats 000)							
Dailies	9,100	8,700	9,700	10,800	11,363	24.87	5.21
Dailies \$	7,989	7,464	8,103	10,800	11,086	38.77	2.65
Non-dailies	4,600	4,500	4,900	3,300	5,930	28.91	79.70
Sales revenues (Lats 000)							
Dailies	11,600	13,000	14,600	16,600	16,330	40.78	-1.63
Dailies \$	10,184	11,154	12,196	16,600	15,932	56.44	-4.03
Non-dailies	9,600	9,400	8,872	8,320	8,303	-13.51	-0.20
Volume of advertising sold (cm²)							
Total	-	13,316,049	14,297,801	15,495,696	-	-	-

Source: Latvian Press Publishers Association, TNS BMF Latvia Adex
\$ in constant 2002 prices



Contribution of classified, display and insert advertising to total advertising income (%)

	1998	1999	2000	2001	2002
Display	94.9	90.8	90.0	88.4	88.6
Classified	2.0	4.0	4.3	5.4	5.2
Inserts	3.1	5.2	5.7	6.2	6.2

Cover prices

	Lats
Single copy	0.10-0.40
Subscription	0.10-0.35

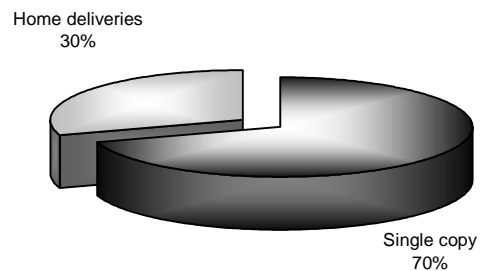
Source: Latvian Press Publishers Association

Type of newspaper sales (%)

	Single copy	Home deliveries
1999	60	40
2000	62	38
2001	61	39
2002	67	33
2003	70	30

Source: Latvian Press Publishers Association

Type of newspaper sales in 2003 (%)



Distribution costs

	1999	2000	2001	2002	2003
As % of average cover price					
Single copy sales	28	28	28	28	28
Home deliveries	25	26	26	26	26
Average cost per copy					
Subscription	Lats -	0.04	0.04	0.16	17.00
Single copy	Lats -	0.05	0.06	0.21	23.00
Newsprint costs (average per ton)					
Lats	-	-	315	315	297

Top ten dailies (2003)

Title	Publisher	Circulation (000)	Readership (000)	Cover Price		Format	Full page rate (Lats)	
				Lats	US\$		Mono	Colour
Lauku Avize	AS Lauku Avize	65	260	0.30	0.49	A3	1,805	2,137
Diena	AS Diena	58	310	0.39	0.63	A2	1,926	2,618
Vesti Segodna	SIA Fenster IN	29	187	0.17	0.28	A2	1,534	2,108
Neatkariga Rita Avize	SIA Mediju Nams	28	133	0.25	0.40	A2	1,630	2,043
Chas	SIA IN Petits	20	124	0.17	0.28	A2	1,661	2,316
Rigas Balss	SIA Mediju Nams	14	50	0.25	0.40	A3	1,054	1,159
Vakara Zinas	SIA Mediju Nams	13	62	0.25	0.40	A3	817	846
Dienas Bizness	SIA Diena Bonnier	12	68	0.39	0.63	A3	1,210	1,720
Bizness&Baltija	SIA Medija un Baltija	12	49	0.25	0.40	A2	1,170	1,946
Telegraf	SIA Belokons un partneri	12	45	0.20	0.32	A2	8,461	12,700

Newspaper colour capability & formats (dailies)

Number of:	1999	2000	2001	2002	2003
4-colour newspapers	12	12	13	31	30
Broadsheets	6	6	9	8	7
Tabloids	13	14	14	71	76
Other	1	1	-	10	11

Note: dailies only before 2002



Top advertising categories (2003)

Advertising sector	% of display ad revenue
Business & financial services, property	20
Communication, electronics, computers	17
Construction, furniture	9
Entertainment, culture, recreation	8
Media, publishing	7
Transport, tourism services	6
Transport means	5
Food products	4
Trading	4
Education, training	4

Source: TNS BMF Latvia Adex

Top ten advertisers (2003)

Advertiser	Newspaper expenditure Lat (000)
Lattelekom	330.0
Inpoc Baltics	320.9
LMT	317.4
Elcor	261.1
Ekspress Tur	243.9
Labi Computers	241.5
LNT	208.1
Scandinavian Tobacco	181.7
TV 3	128.8
TV 5	123.7

Source: TNS BMF Latvia Adex

Top ten publishing companies (2003)

	Total annual sales
SIA IN Petits	35,492,444
SIA IN Fenster	33,730,996
SIA Mediju Nams	20,072,884
AS Diena	18,298,800
AS Lauku Avize	17,082,000
SIA Kurzemes Vards	4,992,000
SIA Mozus	3,744,000
SIA Diena Bonnier	3,120,000
SIA Medija un Baltija	3,120,000
SIA Zemgales Zinas	2,995,000

Internet publishing (no. of online editions)

	1999	2000	2001	2002	2003
Dailies	4	8	13	14	14
Non-dailies	1	6	12	14	15

Source: Latvian Press Publishers Association

Online readership (page impressions per month)

Newspaper		2002	2003
Chas	www.chas-daily.com	430,810	415,922
Diena	www.diena.lv	221,400	250,050
Dienas Bizness	www.db.lv	65,000	68,000
NRA	www.nra.lv	37,870	38,490
Zemgales Zinas	www.zz.lv	5,740	19,800

Source: Latvian Press Publishers Association

ADVERTISING EXPENDITURE & ECONOMIC DATA

Advertising expenditure

(Lats million, in current prices)

	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
Newspapers	8.6	10.9	10.4	11.1	10.8	12.7	14.1	14.1	14.5	14.9	15.4
Magazines	1.0	1.7	1.6	2.1	2.4	3.5	4.7	5.0	5.3	5.8	6.1
Television	10.5	22.9	8.6	8.9	10.1	11.5	13.6				
Radio	1.5	2.1	3.1	4.4	4.9	4.3	5.1				
Cinema	0.0	0.0	0.0	0.0	0.2	0.2	0.3				
Outdoor	0.5	0.8	1.0	1.6	1.5	1.7	2.2				
Internet	0.0	0.0	0.0	0.0	0.1	0.3	0.5				
Total	22.1	38.4	24.7	28.1	30.0	34.2	40.5	41.8	43.7	45.6	48.8

Source: 1996-2002 BMF Gallup Media, 2003-2006 ZenithOptimedia

Notes: 1996-1997: Before discounts; includes agency commission, production costs and classified
1998-2006: After discounts; excludes agency commission, production costs and classified

Main economic indicators 1996-2002

	1996	1997	1998	1999	2000	2001	2002
1 US\$= 0.62 Lats at 2002 rate							
Gross Domestic Product (Lats million)							
at current prices	2,807	3,270	3,592	3,890	4,348	4,813	5,195
% change	20.5	16.5	9.9	8.3	11.8	10.7	7.9
at 2002 prices	3,290	3,258	3,302	3,415	3,731	4,021	5,195
% change	-3.6	-1.0	1.3	3.4	9.3	7.8	29.2
Gross Domestic Product per capita (Lats)							
at current prices	1,127	1,324	1,466	1,601	1,789	2,039	2,201
at 2002 prices	1,321	1,319	1,348	1,405	1,535	1,704	2,201
Population							
Millions	2.5	2.5	2.5	2.4	2.4	2.4	2.4
Consumer Price Index							
2002=100	85.3	100.3	108.8	113.9	116.6	119.7	100.0
% change	25.0	17.6	8.4	4.7	2.3	2.7	-16.5
Ad.spend as a % of GDP							
	0.79	1.17	0.69	0.72	0.69	0.71	0.78
Advertising Expenditure Growth (%)							
at current prices	63.2	74.1	-35.6	13.7	6.8	14.0	18.4
at 2002 prices	30.6	48.0	-40.6	8.6	4.3	11.0	41.8

Source: IFS, ZenithOptimedia

Research

Circulation: No independent organisation audits circulation

Readership is measured by: Baltic Data House & BMF

Taxes

VAT on: single copy sales 9% subscription sales 18% advertising 18% newsprint 18%
plant 18% composition 18% (standard VAT rate 18%)

There are no extra taxes on advertising and bill posting. The tax rate on profits for newspapers is the standard rate of 19%.

Discounts

on: post 0 rail 0 telephone 0 telegraph 0 telex 0

Ownership

Is there any law prohibiting daily newspaper or periodical publishers from operating radio or television stations in the same locality? No

Is there an antitrust law limiting concentration in the daily press? No

Is further regulation of media concentration expected? No

LEBANON

Commentary – Nagi Tuani, An Nahar

Lebanon has been in recession 2002. It has tried to reduce its budget deficit but has not eliminated it. Newspapers have coped with the recession better than television and radio.

Al Balad, a new daily covering politics, launched in November 2003. It publishes seven days a week.

More newspapers depend on Libanpost services for distributing subscriptions.

Since 2002 there has been 10% VAT on advertising (10%), but there is still no VAT on printing or paper.

POPULATION & MORE FACTS

Population by age and sex (2001)

	All individuals		Male		Female		Households 000
	000	%	000	%	000	%	
Children	766	25	387	25	379	25	671
16-24	667	22	337	22	330	22	
25-34	552	18	279	18	273	18	
35-44	368	12	186	12	182	12	
45-54	275	9	138	9	137	9	
55-64	230	8	116	7	114	8	
65+	207	7	104	7	103	7	
Total	3,065	100	1,547	100	1,518	100	

Source: Ipsos-Stat

Newspaper reach (%)

	Daily
All adults	35
MHS	33
<i>MHS: Main Household Shopper</i>	

Age structure of readership (2001)

Age	% daily reach within age group
16-24	29
25-34	24
35-44	16
45-54	12
55-64	10
65+	9

Population by social class and sex (2001)

	All individuals		Male		Female	
	000	%	000	%	000	%
Upper	450	15	227	15	223	15
Upper middle	552	18	278	18	274	18
Lower middle	1,015	33	512	33	503	33
Lower/subsistence	1,047	34	529	34	518	34
Total	3,064	100	1,546	100	1,518	100

Source: Ipsos-Stat

Upper = major employers, managers & professionals, retired people with high income level

Upper middle = high-ranking employees, employers (<10 employees) with medium to high income levels

Lower middle = middle ranking employees, independent workers and employers (<10 employees) with lower income level

Lower = low-ranking employees and independent workers, agriculture and manual workers with lower income level.

Subsistence = households with lowest income level or unemployed individuals

Households (2001)

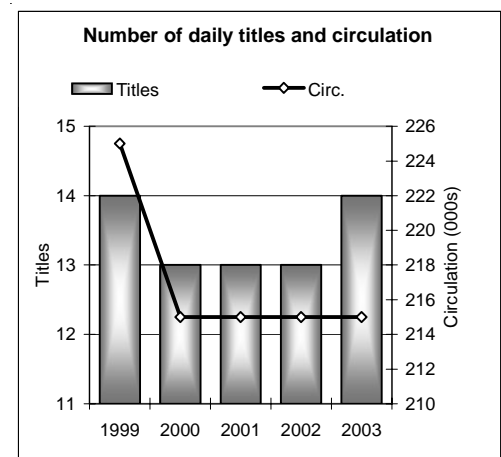
Occupancy	Households	
	000	%
1 person	27	4.0
2 people	201	30.0
3 people	120	17.9
4 people	141	21.0
5 or more people	182	27.1
without children	422	62.9
with children	249	37.1
with youngest child aged 0-3	67	10.0
with youngest child aged 4-9	74	11.0
with youngest child aged 10-15	100	14.9
Total	671	100

Source: Ipsos-Stat

NUMBER OF TITLES AND CIRCULATION

	1999	2000	2001	2002	2003	Change (%)	
						99/2003	2002/03
Number of titles							
Total dailies	14	13	13	13	14	0.00	7.69
National dailies	12	11	11	11	12	0.00	9.09
Pan-regional dailies *	2	2	2	2	2	0.00	0.00
Free non-dailies	-	-	2	3	4	-	33.33
Sundays	3	3	-	-	-	-	-
Circulation (000)							
Total dailies	225	215	215	215	215	-4.44	0.00
National dailies	215	205	205	205	205	-4.65	0.00
Pan-regional dailies *	10	10	10	10	10	0.00	0.00
Free non-dailies	-	-	300	300	400	-	33.33
Sundays	30	35	35	35	-	-	-
Total annual sales (millions of copies)							
Dailies	50.6	48.0	50.0	52.0	54.0	6.72	3.85
National dailies	-	-	-	-	51.5	-	-
Pan-regional dailies *	-	-	-	-	2.5	-	-
Free non-dailies	8	15.6	16	24	28	250.00	16.67
Sundays	1.4	1.4	1.4	1.4	-	-	-

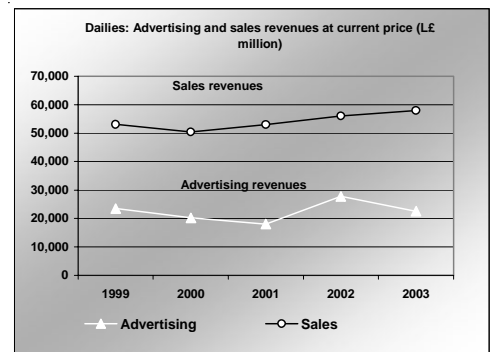
*This refers to *Al Sharq al Awsat* and *Al Hayat*, two pan-regional titles based in Saudi Arabia with print and sales licences for Lebanon.





MORE FACTS

	1999	2000	2001	2002	2003	Change (%)	
						99/2003	2002/03
Advertising revenues (L£ million)							
Dailies	23,520	20,250	18,000	27,750	22,500	-4.34	-18.92
Free non-dailies	-	600	450	550	450	-	-18.18
Newspaper online ads	-	75	50	75	85	-	13.33
Sales revenues (L£ million)							
Dailies	53,100	50,400	53,000	56,000	58,000	9.23	3.57
Sundays	980	980	1,000	1,100	-	-	-
Volume of advertising sold (pages & page equivalents)							
Total	3,600	3,350	3,000	4,500	4,000	11.11	-11.11
In Colour	108	135	180	320	450	316.67	40.63



Figures are given before discounts

Agency commission is 15%

Volume rebate ranges from 2% to 10%

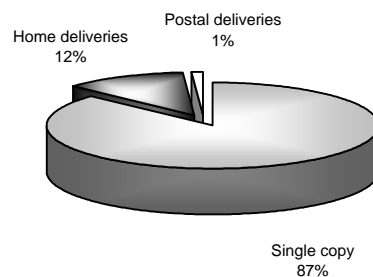
There is no VAT on the selling price of newspapers

Type of newspaper sales (%)

	Single copy	Home deliveries	Postal deliveries
1999	93	7	-
2000	91	9	-
2001	90	10	-
2002	88	12	-
2003	87	12	1

Source: Ipsos-Stat

Type of newspaper sales in 2003 (%)



Cover prices

	L£
Single copy	1,000-2000

Contribution of classified, display and insert advertising to total advertising income (%)

	1999	2000	2001	2002	2003
Display	88	89	85	84	80
Classified	10	8	11	12	14
Inserts	3	3	4	4	6

Employment

	1999	2000	2001	2002	2003
Total no. of journalists	1,095	1,175	1,200	1,250	1,300
Total no. of employees	1,650	1,750	1,800	1,850	1,930

Distribution and newsprint costs

	1999	2000	2001	2002	2003
As % of average cover price					
Single copy sales	30	30	30	30	30
Home deliveries	30	30	30	30	30
Average distribution cost per copy					
Subscription	L£ 600	600	600	600	600
Single copy	L£ 600	600	600	600	600
Newsprint costs (average per ton)					
L£	1,080,000	990,000	900,000	825,000	750,000

Newspaper colour capability

Number of:	1999	2000	2001	2002	2003
4-colour newspapers	12	11	11	11	12
Broadsheets	14	13	13	13	14

Internet publishing (number of online editions)

	1999	2000	2001	2002	2003
Dailies	6	6	6	6	6
Non-dailies	-	1	1	1	-

Online readership monthly page impressions (000s)

Newspaper		1999	2000	2001	2002	2003
An-Nahar	www.annanhar.com	2,500	4,500	5,000	6,500	10,000
Assafir	www.assafir.com	2,500	3,500	4,000	6,000	10,000
Daily Star	www.dailystar.com	2,500	3,500	4,000	5,000	7,000
L'orient Le jour	www.lorientlejour.com	1,000	3,500	4,000	4,500	6,000
Al Anwar	www.alanwar.com	2,000	3,000	3,500	4,000	5,000



Top dailies (2003)

Title	Publisher	Circulation (000)	Readership (000)	Cover Price		Format	Full page rate (L£ 000)	
				L£	US\$		Mono	Colour
An-Nahar	An-Nahar	50	250	2,000	1.33	Broadsheet	14	21
Assafir	Assafir	45	186	1,000	0.66	Broadsheet	14	21
Al Dyar	Al Dyar	20	120	1,000	0.66	Broadsheet	10	10
Al Anwar	Al Anwar	20	120	1,000	0.66	Broadsheet	11	20
L'orient Le Jour	Societe Generale De Presse	20	70	2,000	1.33	Broadsheet	14	21
Daily Star	Daily Star	15	45	2,000	1.33	Broadsheet	12	-
Al Liwaa	Al Liwaa	15	75	1,000	0.66	Broadsheet	11	-
Al Hayat	Al Hayat	10	21	1,000	0.66	Broadsheet	11	-
Al Sharq Al Awsat	Al Sharq Al Awsat	6	12	2,000	1.33	Broadsheet	11	-
Al Sahrq	Al Sharq	6	12	1,000	0.66	Broadsheet	12	-

Top ten advertisers (2002)

Advertiser
Banque de la méditerranée
Nobilis
Aishti
Winston
Samsung
Banque Libano Francaise
Mobili Top
BHV
Madinat Al Mafrouchat
Emirates

Source: ARABAD, Ipsos-Stat

Top publishing companies (2003)

(ranked by circulation)
An-Nahar Group
Dar Assayad Group
Dar Al Layla Wa Layla Group

Top ten advertising categories (2002)

Advertising sector	Expenditure %
Clothing & accessories	25
Hygiene/beauty care	22
Banking/finance	21
Servicing companies	11
Transportation & accessories	10
Furniture/decoration	3
Office supplies	2
Distribution	2
Telecommunications	2
Household appliances	2

Source: ARABAD, Ipsos-Stat

Advertising expenditure

(L£ millions, in current prices)

	1996	1997	1998	1999	2000	2001	2002
Newspapers	61,442	70,500	76,328	90,822	57,861	60,629	56,578
Magazines	26,871	31,584	35,477	34,609	33,792	37,415	38,618
Television	367,865	383,990	448,945	557,609	547,818	543,920	482,715
Radio	56,570	39,818	32,196	33,466	28,799	24,333	23,945
Outdoor	1,729	4,578	13,531	21,370	25,949	33,470	46,013
Total	514,477	530,470	606,477	737,876	694,219	699,767	647,869

Source: 1996-2002 Ipsos-Stat

Notes: Includes classified advertising and agency commission, excludes production costs, before discounts

2002 exchange rate: 1 L£ = US\$ 1,508

Research

Circulation is audited by: Office de justification de la diffusion (OJD)

Readership is audited by: PARC (Pan Arab Research Co)

Taxes

VAT on:	sales 0	advertising 10%
	newsprint 10%	plant 10%
	composition 10%	(standard VAT rate 10%)

VAT was applied for the first time in February 2002. There is no VAT on printing cost or sales revenues. There is a 10% tax on advertising and a 10% tax on newspaper profits, which is the standard rate for all companies.

Subsidies

Are there subsidies for the purchase of newsprint? Newspapers are exempt from customs duties.

Are loans granted at low interest rates for re-equipping or improving existing equipment? No

Discounts

on:	post 2%	rail 0	telephone 50%
	telegraph 0	telex 0	

Ownership

Does any law exist governing publishing-house ownership, or the registration of shares in newspaper-publishing companies? Publishers are governed by the Press Law, but anyone from Lebanon can buy a licence to publish a newspaper.

Is there any law prohibiting or restricting foreign companies or individuals from owning shares, and in particular, the majority of shares, of domestic daily newspapers? Foreigners cannot own shares in Lebanese newspapers.

Is there any law prohibiting daily newspaper or periodical publishers from operating radio or television stations in the same locality? No

So as to guarantee disclosure and transparency in the capital structure and to avert silent partnerships, is there a law or rule making it possible to determine who actually owns a publishing company? Publishing houses must submit information to the regulator.

Is there an antitrust law limiting concentration in the daily press? No

Is further regulation of media concentration expected? No

General economic situation

GDP total US\$5.106 billion; GDP per capita US\$2,742 (purchasing power parity; 2002). Consumer price index 110 (2002).

Performance of newspapers vs. other media

The government owns or controls one radio station and a 1.5 hour daily newscast on a local television channel. There are four private radio stations, but no private local television station. South African and global satellite television and radio broadcasts are widely available.

Performance of different types of newspapers

The press suffered during rioting in 1998, when most newspaper offices were damaged. There are no daily newspapers in the country. There are six independent newspapers – including one controlled by the Roman Catholic Church, one controlled by the Lesotho Evangelical Church, and four English-language weeklies. The government owns or controls two weekly newspapers.

Media/press laws

A 1938 proclamation prohibits criticism of the government and contains liabilities for seditious libel. There is a lack of free access to government information.

Sources: CIA – *The World Factbook 2003*; *Freedom House*; *BBC News*

POPULATION

Population by age and sex

	All individuals		Male		Female	
	000	%	000	%	000	%
0-14	702	38	353	39	349	37
15-64	1,058	57	516	57	542	57
65+	102	5	42	5	60	6
Total	1,862	100	911	100	951	100

Source: CIA – *The World Factbook 2003*

General economic situation

GDP total US\$3.116 billion; GDP per capita US\$939 (purchasing power parity; 2002). Consumer price index 115 (2002).

Performance of newspapers vs. other media

In 2002, the then President Charles Taylor owned or controlled nearly all print and broadcast media, as well as a 50% stake in Liberia's only printer, the Sabannah Printing Press. Liberia's media scene was dominated by the Liberian Communication Network (LCN), owned by Taylor and his party. LCN runs a TV service, two FM stations and one shortwave radio station. It has its own printing press, on which all privately-owned newspapers have to be printed, and it publishes two newspapers.

Radio is the primary means of mass communication. There are several FM stations in Monrovia: two private commercial stations (DC-101); and Radio Veritas, which operates under the Catholic Archdiocese. There is also the state-run national station (ELBC), a FM station operated by LCN. ELBC and Radio Veritas also broadcast on short-wave frequencies strong enough to reach all parts of the country. In 2001 President Taylor closed the short wave frequency of Radio Veritas, citing "illegal operation." In 2002, the government restored the station's short-wave license, and Radio Veritas resumed short-wave broadcasting. There was a French broadcast through the national radio facility, a religious station (with limited short-wave capacity), and a growing number of small local stations in cities around the country. Media practitioners believed that the ruling party funded many of these stations.

Television is limited to those who can purchase sets, the generators, and fuel to provide electricity. For those persons and businesses with satellite capability, CNN is available. There are two television stations: The LCN, and the Ducor Broadcasting Corporation, which was privately owned but assisted by President Taylor's generator. The state-owned Liberian Broadcasting System (LBS) has no television service and is struggling to maintain its single radio service.

Performance of different types of newspapers

In 2002, there were eight newspapers that published during the year; however, some published irregularly. Two were independent dailies and five usually appeared at least once a week. The Public Affairs Bureau of the Ministry of Information, Culture, and Tourism published one newspaper, and the communications network owned by the president published a weekly newspaper. The ruling party also published a newspaper. Newspaper availability fluctuated during the year. Management of the one printing facility capable of producing newspapers was subject to pressure from the government. To meet the costs of production, the typical newspaper's eight pages included two or three pages of advertisements or paid announcements. Some articles were the result of gifts or money that supplemented reporters' meagre salaries.

Newspaper launches/closures

In 2001, the government ordered closure of four private sector dailies, *The News*, *The New National*, *The Analyst*, and the *Monrovia Guardian*, until they paid overdue taxes. The *Monrovia Guardian* was allowed to appear again after paying overdue taxes of 60,000 Liberian dollars (about Euro 67,500). The information minister ordered the suspension of the weekly *The Journalist*, without any explanation. All these publications reopened within weeks of their closure.

Authorities shut down *The Analyst*, a leading independent daily, several times during 2002 under the new state of emergency legislation.

Advertising

Critical news outlets have been threatened by a withdrawal of advertising. Reporting that criticized the government brought directives from powerful government officials to advertisers that they should discontinue business with that media outlet.

Media/Press Laws

In 2002, the government introduced a state of emergency that broadened its powers to clamp down on dissent,



announcing that those who criticized the decree would be 'dealt with' under the new emergency laws.

Distribution

Due to the high price of newspapers, the high rate of illiteracy (estimated at 75%), high transportation costs, and

the poor state of roads elsewhere in the country, newspaper distribution is generally limited to the Monrovia area.

Sources: CIA – *The World Factbook 2003*; *Freedom House*; *US State Department*; *International Press Institute*; *BBC News*; *Reporters Without Borders*; *Committee to Protect Journalists*

POPULATION & MORE FACTS

Population by age and sex

	All individuals		Male		Female	
	000	%	000	%	000	%
0-14	1,442	43	725	44	717	43
15-64	1,757	53	858	52	899	54
65+	118	4	59	4	59	4
Total	3,317	100	1,642	100	1,675	100

Source: CIA 2003

Top dailies (2002)

Title

The Inquirer
The News

Source: WAN from public sources

LIBYA

General economic situation

GDP total US\$33.36 billion; GDP per capita US\$6,066 (purchasing power parity; 2002). Consumer price index 101 (2001).

Performance of newspapers vs. other media

The state owns and controls the country's media outlets, and the authorities do not permit the publication of opinions contrary to government policy. Government control over the media has resulted in much of the population preferring to entertain itself by watching videos or foreign stations via satellite, such as CNN. Libyan television programmes are mostly in Arabic with a 30-minute news broadcast each evening in English and French. There is good reception for the BBC World Service.

Performance of different types of newspapers

There is a state-run daily newspaper, *Al-Shams*, with a circulation of 40,000. Another daily newspaper is *Al-Fajr al-Jadid*, published in Tripoli. Local Revolutionary Committees publish several smaller newspapers. The official news agency, JANA, is the designated conduit for official views. Foreign publications as *Newsweek*, *Time*, the *International Herald Tribune*, *L'Express*, and *Jeune Afrique* are available, but authorities

routinely censor them and have the power to prohibit their entry into the market. Foreign newspapers are often out-of-date by the time they reach the shop.

Newspaper launches/closures

In 2003, the Standing Revolutionary Court suspended the daily *Al-Zahf Al-Akhdar* ('The Green Step'), the organ of Libya's revolutionary committees, for it reportedly criticised and insulted certain Arab countries, including Bahrain and Kuwait.

Online/digital publishing

The internet is widely available in the country.

Media/press laws

The government restricted freedom of speech in several ways: by prohibiting all political activities not officially approved; by enacting laws so vague that many forms of speech or expression may be interpreted as illegal; and by operating a pervasive system of informants that created an atmosphere of mistrust at all levels of society.

Sources: CIA – *The World Factbook 2003*; *Freedom House*; *IFEX*; *WAN from public sources*

POPULATION & MORE FACTS

Population by age and sex

	All individuals		Male		Female	
	000	%	000	%	000	%
0-14	1,899	35	970	34	929	35
15-64	3,376	61	1,745	62	1,631	61
65+	224	4	109	4	115	4
Total	5,499	100	2,824	100	2,675	100

Source: CIA - *The World Factbook 2003*

Top dailies (2003)

Title	Circulation (000)
Al-Shams	40
Al-Fajr al-Jadid	-
Al-Jamahiria	-
Alfajr aljadeed	-
Azzahf alakhder	-

Source: WAN from public sources

General economic situation

GDP total US\$825 million; GDP per capita US\$25,000 (purchasing power parity; 2002). Consumer price index 101 (2001).

Performance of newspapers vs. other media

One state and one private television station broadcast, along with a private radio station. Residents receive radio and television broadcasts from neighbouring Switzerland and Austria.

Performance of different types of newspapers

Liechtenstein has a very sparse media scene, with the circulation figures of its newspapers at around 10,000 or less. Two daily newspapers are published, each representing the interests of one of the two major political parties. The largest Liechtenstein daily newspaper is the *Liechtensteiner Vaterland* with the circulation over 10,000 copies; a large Tuesday edition

has the circulation of 18,000. The *Liechtensteiner Vaterland* is published by the Vaduzer Medienhaus AG, a public company that publishes and markets both print, and audio-visual and electronic media. It employs 48 people. There is one weekly news magazine. An information bulletin also is issued by the third party (Freie Liste) represented in parliament.

State support

The law maintains and promotes diversity in the media; in 2001 the parliament appointed an independent media commission to decide how to distribute approximately US\$600,000 (954,000 Swiss francs) in government subsidies to the media groups for training or research programs dedicated to the promotion of news and information.

Sources: CIA – *The World Factbook 2003*; US State Department; Freedom House; BBC News; WAN from public sources

POPULATION & MORE FACTS

Population by age and sex

	All individuals		Male		Female	
	000	%	000	%	000	%
0-14	6	18	3	19	3	18
15-64	24	73	12	75	12	71
65+	3	9	1	6	2	12
Total	33	100	16	100	17	100

Source: CIA - *The World Factbook 2003*

	2002
Number of titles	
Total dailies	2
National dailies	2

Source: WAN from public sources

Top dailies (2003)

Title	Publisher	Circulation (000)
Liechtensteiner Vaterland	Vaduzer Medienhaus AG	10.5
Liechtensteiner Volksblatt	-	-

Source: WAN from public sources

POPULATION

Population by age and sex

	All individuals		Male		Female	
	000	%	000	%	000	%
Children	736	21	377	23	359	19
16 - 24	445	13	226	14	219	12
25 - 34	496	14	246	15	250	13
35 - 44	537	15	261	16	276	15
45 - 54	413	12	192	12	221	12
55 - 64	368	11	158	10	210	11
65 +	489	14	169	10	320	17
Total	3,484	100	1,629	100	1,855	100

Source: Lithuanian Statistic Departments (population poll data 2002)

Housewives (co-habiting persons)

	Housewives	
	000	%
under 25	10.0	10.1
25-34	35.0	35.3
35-44	27.0	27.2
45-54	17.0	17.1
55-64	10.0	10.1
over 65	0.2	0.2
Total	99	100

Source: TNS Gallup National Readership Survey 2003, ages 15-74

Population by social class and sex

	All adults		Males		Females	
	000	%	000	%	000	%
A+B	561	21	260	21	301	22
C1	246	9	112	9	134	10
C2	1,060	40	510	41	550	39
D	73	3	38	3	35	3
E	682	26	309	25	373	27
Total	2,622	100	1,229	100	1,393	100

Source: TNS Gallup Media National Readership Survey 2003, ages 15-74

A = well educated top managers, professionals and self-employed

B = well educated middle managers

C1 = middle managers in smaller companies, well educated

non-manual workers and small business owners

C2 = well educated supervisors and skilled manual workers, moderately educated non-manual workers

D = less well educated supervisors and skilled and unskilled manual workers, poorly educated non-manual workers

E = less well educated skilled and unskilled manual workers, small business owners and farmers

Households

Occupancy	Adults	
	000	%
1 person	398	15
2 people	776	30
3 people	639	24
4 people	565	22
5 or more people	247	9
without children	1,324	50
with children	1,301	50
with children aged 0-3	264	10
with children aged 4-11	597	23
with children aged 12-19	766	29
Total	2,625	100

Source: TNS Gallup Media National Readership Survey 2003, ages 15-74



Newspaper reach (%)

	Daily
All adults	51.6
Men	50.9
Women	52.2
MHS	52.0

Source: TNS Gallup Media National Readership Survey 2003, ages 15-74
MHS: Main Household Shopper

Age structure of readership

Age	% of readership *	% reach within age group *
15-24	17.0	51.6
25-34	19.0	56.4
35-44	19.0	59.2
45-54	18.0	55.0
55-64	16.0	49.1
65+	11.0	32.6

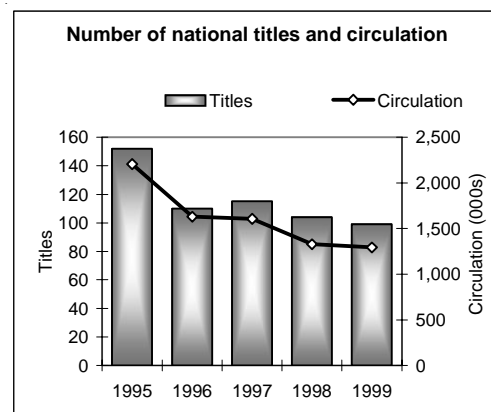
Source: TNS Gallup Media National Readership Survey 2003, ages 15-74

* average percentage of people who have read or looked over one issue of an edition (this is known as the cover percentage)

NUMBER OF TITLES AND CIRCULATION

	1995	1996	1997	1998	1999	Change (%)	
						1995/99	1998/99
Number of titles							
National	152	110	115	104	99	-34.87	-4.81
Regional	245	333	324	311	278	13.47	-10.61
Circulation (000)							
National	2,205	1,631	1,606	1,327	1,294	-41.32	-2.49
Regional	1,206	1,234	1,125	1,086	894	-25.87	-17.68
Total annual sales (millions of copies)							
National	159	132	134	133	125	-21.62	-6.31
Regional	109	101	80	82	81	-25.32	-0.37

Source: Lithuanian Statistical Yearbook 2000



MORE FACTS

	1999	2000	2001	2002	2003	Change (%)	
						99/2003	2002/03
Advertising revenues (US\$ 000) ***							
Dailies	32,300	24,100	25,616	35,760	31,602	-2.2	-11.6
Dailies §	33,571	24,789	26,026	35,760	31,135	-7.3	-12.9
Non-dailies and Sundays **	544	671	1,380	2,235	2,475	355.0	10.7
Advertising volume (in million cm²)*							
Total	26,500	27,000	28,400	25,000	25,000	-5.7	0.0

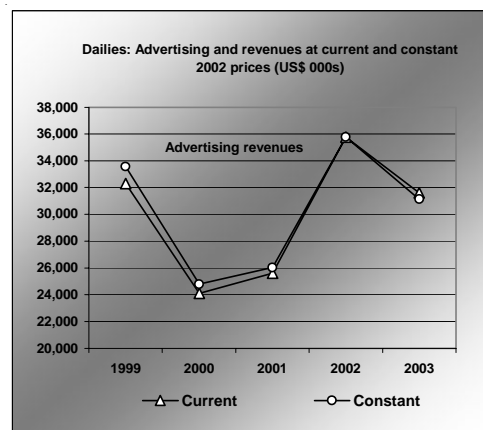
Source: TNS Gallup, Advertising Expenditure Survey

* includes magazine advertising volume except for 2002/2003 where only newspapers are included

** does not include Sundays for 2002/2003

*** figures quoted for 2002 are before discounts

§ in constant 2002 prices



Top ten dailies (2003)

Title	Publisher	Circulation * (000)	Newspaper reach ** (%)	Format ***	Full page rate ***	
					Mono (Litai/cm ²)	Colour (Litai/cm ²)
Vakaro žinios	Naujasis aitvaras	97	25	1,019.1 cm ²	3	4
Lietuvos rytas	Lietuvos rytas	79	46	1,184.4cm ²	10	13
Respublika	Respublikos leidiniai	46	18	1,019.1 cm ²	8	10
Kauno diena	Kauno diena	39	10	975.24 cm ²	7	9
Respublika (Russian edition)	Respublikos leidiniai	22	5	1,019.1 cm ²	2	3
Vakarų ekspresas	Brolių Tomkų leidykla	21	5	1,019.1 cm ²	2	3
Klaipėda	Klaipėdos laikraščio redakcija	20	6	1,007 cm ²	3	5
Lietuvos žinios	Lietuvos žinios	19	13	976.6 cm ²	7	10
Šiaulių kraštas	Šiaulių kraštas	16	6	920 cm ²	7	14
Verslo žinios	Verslo žinios	10	4	1,239 cm ²	8	11

Source: TNS Gallup Media National Readership Survey 2003, aged 15-74 (sample of 6,501 respondents)

* Circulation figures are publishers' claims

** adults aged 15-74

*** 2002 figures

**Top ten advertising categories (2003)**

Advertising sector	% of display ad revenue
Mobile communication	10.83
Recruitment	5.29
Retail	4.48
Governmental institutions	4.04
Auto	3.61
Alcoholic drinks	3.38
Finance	3.25
Announcements	3.21
Furniture	2.55
Concerts/festivals/shows	2.45

Source: TNS Gallup, Advertising Expenditure Survey

Top ten advertisers (2003)

Advertiser	Ad expenditure Litai (000)*
Omnitel	4,500
Bité	3,354
VP Market	2,711
Lietuvos Telekomas	2,261
Olifeja	1,433
Tele2	1,343
ONE	1,242
Palink	1,223
Nord/LB	1,087
Žalgirio Loto	1,066

Source: TNS Gallup, Advertising Expenditure Survey

* Gross expenditure

Top publishers (2000)

ranked by circulation
Lietuvos rytas
Respublikos leidiniai
Vingis
Moteris
Kauno diena

ADVERTISING EXPENDITURE & ECONOMIC DATA**Advertising expenditure**

(Litai million, current prices)

	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
Newspapers	27	71	87	81	74	69	74	78	92	116	127
Magazines	3	10	11	13	13	26	28	32	38	48	55
Television	27	68	81	84	74	75	96				
Radio	7	11	15	13	10	18	18				
Cinema	-	-	-	-	1	0	0				
Outdoor	9	12	12	12	17	10	16				
Internet	-	-	-	0.1	0.7	0.1	1.5				
Total	74	171	206	203	190	198	234	271	326	407	459

Source: 1996-2002 Media House/SIC Gallup, 2003-2006 ZenithOptimedia

Notes: Excludes agency commission, production costs and classified; after discounts

Main economic indicators 1996-2002

	1996	1997	1998	1999	2000	2001	2002
1 US\$=	4.00						
							Litai at 2002 rate
Gross Domestic Product (Litai million)							
at current prices	31,529	38,520	43,555	32,608	44,698	47,498	50,679
% change	30.8	22.2	13.1	-25.1	37.1	6.3	6.7
at 2002 prices	37,767	42,366	45,586	33,891	45,977	48,258	50,679
% change	6.7	12.2	7.6	-25.7	35.7	5.0	5.0
Gross Domestic Product per capita (Litai)							
at current prices	8,498	10,383	11,772	8,909	12,081	13,610	14,521
at 2002 prices	10,180	11,420	12,321	9,260	12,426	13,827	14,521
Population							
Millions	3.7	3.7	3.7	3.7	3.7	3.5	3.5
Consumer Price Index							
2002=100	83.5	90.9	95.5	96.2	97.2	98.4	100.0
% change	24.6	8.9	5.1	0.7	1.0	1.2	1.6
Ad.spend as a % of GDP							
	0.24	0.44	0.47	0.62	0.43	0.42	0.46
Advertising Expenditure Growth							
at current prices	76.8	130.5	20.2	-1.3	-6.5	4.0	18.0
at 2002 prices	41.9	111.7	14.4	-2.0	-7.4	2.7	16.2

Source: IFS, ZenithOptimedia

Research

No independent organisation audits circulation in Lithuania

Readership is audited by: TNS Gallup - National Readership Survey (NRS)

Methodology: NRS uses the CAPI (computer assisted personal interview) survey method to conduct quarterly interviews with

6,501 people, aged 15-74, covering 177 Lithuanian newspapers and magazines. Coverage and maximum coverage are the main parameters used for the analysis of press audience. Coverage is the average number or percent of people who have read or looked over one issue of edition, where as maximum coverage is the total number or percent of people who had a chance to read or look over at least one issue of edition during certain period.

Commentary – Publinvest

Advertising expenditure

€92 million was the gross amount invested in display advertising during 2003. Expenditure increased by 3.4% (more than €3 million), a situation contrasting with 2002's 2.4% decline, and which tempers the first quarter outlook for 2004.

- 1st quarter: +4.2%
- January-June: +2.5%
- January-September: +2.8%
- Year 2003: +3.4%

However, it should be recognised that caution was the rule during the year, with a slightly stronger response in the last quarter. Luxembourg followed the same trend as its neighbours, where the beginning of the year was not very good but a recovery made itself felt during the spring.

If for many years Luxembourg has been relatively protected from international developments and unharmed by the overall economic situation, the correlation between economy and media investment appears today more obvious. Naturally, there is still some capacity for investment but investors are more cautious about capital commitments than in the past.

Luxembourg is lagging behind other countries, especially compared to Belgium, to which Luxembourg is closely linked.

- France: +4.9% (€16.6 billion = 5 media)
- Belgium: +10.6% (€1.93 billion = 5 media)
- Germany: +3.2% (€17.1 billion = 5 media)

The €3 million growth did not benefit all media equally. For the past years, the traditional antagonism (print press vs audiovisual) did not function as systematically as it used to, and has given way to a new pattern: promotion media vs image media.

- Daily press: +2.2% - market share 41%
- Radio: +8.5% - market share 19%
- Advertising leaflets: +18.2% - market share 6%

On the other hand, in the media more specifically dedicated to images, developments in 2003 have been more contrasted:

- Outdoor advertising: +32.6% - market share 3%
- Television: +13% - market share of 10%
- Weekly and periodical publications: -8% - market share 19.7%
- Cinema: -13.4% - market share 1%

Advertising expenditure in Luxembourg (€ 000)

	Jan-Dec 2003		Jan-Dec 2002		Change year-on-year		
	0	Market share	0	Market share	0	%	Market share (%)
Daily newspapers	38,084	41.29%	37,282	41.78%	802	2.15%	-1.19%
Weekly newspapers	13,571	14.71%	14,847	16.64%	-1,276	-8.59%	-11.59%
Periodicals	4,625	5.01%	4,937	5.53%	-312	-6.32%	-9.39%
Print total	56,280	61.01%	57,066	63.96%	-786	-1.38%	-4.61%
Radio	17,434	18.90%	16,075	18.02%	1,359	8.45%	4.90%
Television	9,266	10.04%	8,203	9.19%	1,063	12.96%	9.26%
Outdoor	3,062	3.32%	2,309	2.59%	753	32.61%	28.27%
Cinema	1,048	1.14%	1,210	1.36%	-162	-13.39%	-16.22%
Five-media total	87,090	94.41%	84,863	95.11%	2,227	2.62%	-0.74%
Leaflets	5,156	5.59%	4,362	4.89%	794	18.20%	14.33%
Six media total	92,246	100.00%	89,225	100.00%	3,021	3.39%	0.00%
Global market	123,241		118,469		4,772	4.03%	

Source: Publinvest

Note: The media totals refer only to display advertising only, and do not include: classified ads, job offers, public and legal communications, financial announcements and various outdoor ads. The 'global market' total does include all these extra types of advertising

The media

Print (€38 million; 61% market share)

Luxembourg still remains a country where the print press plays a major role, with a market share amounting to 61% of display and 70% of all advertising.

Daily press (including inserts): Display advertising increased by about €800,000 in 2003 to reach €38.1 million. The daily press remains the main recipient of expenditure: it captures more than 41% of total gross investment, much more than the daily press in France (6%, for the national daily press only), Belgium (22%) or Germany (24%). Classified advertising grew even faster, contributing to a 6% rise in total expenditure on the daily press to €67 million.

Weekly press: Advertising newspapers included, the weekly press was confronted by a decline in expenditure of about 8.6%. This was more than the decline in press expenditure in other European countries like Germany (2%), Belgium (2%) and France (no change), but less than last years' 10% drop in expenditure in the weekly press.

Periodical press: This category groups 32 titles (magazines, and newspapers published less often than weekly) for a total gross expenditure of €4.6 million. This category is normally volatile, but has declined for the last two years in a row, and shrank 6.3% in 2003. Car magazines have been the only category to grow.

Radio (€17 million; 19% market share)

With 8.5% growth, radio grew faster than the market as a whole in 2003. Two radio stations are not measured; if they were included in the radio total, it would probably exceed €21 million and secure a market share of 22%. Luxembourg is traditionally a country where radio is widely used, with a much higher market share than usual. Radio remains a flagship medium in the eyes of advertisers from Luxembourg, who use it for promotion. Two reasons account for this:

- Because Luxembourg has no daily TV channel broadcasting round the clock, radio plays the role of the main audiovisual medium.
- Radio is the only medium that uses the language of Luxembourg (the press uses German or French).

The high volume of sponsorship invested in radio, which represents by itself 23.5% of the total, is worth noting.

Television (€9 million; 10% market share)

Two new cable channels – DOK.tv and RTL ZWEE – launched at the beginning of 2004. The television sector now consists of six domestic channels, among which one is a music channel and two are local channels. Only one channel is included in the advertising expenditure figures; this channel attracted €9.3 million in 2003, or 10% of the market. This left Luxembourg's television sector far behind its European neighbours (television has a 32% market share in France, 43% in Germany and 44% in Belgium). But with 13% growth Luxembourg's television sector is more dynamic than its neighbouring counterparts.



Sponsorship is a large component of advertising in television, as it is in radio: it represents 12% of total television ad expenditure.

Cinema (€1 million; 1% market share)

Cinema was the only medium that suffered a large decline in 2003. Expenditure fell by 13% to €1 million, its 2001 level. This decline is difficult to explain in view of the development of television and the subsequent availability of audiovisual productions.

Outdoor (€3 million; 3% market share)

Outdoor advertising kept growing in 2003: after an increase of 4% in 2002 it registered the fastest growth in the market, of 33%. Outdoor is very dependent on the availability of space. Spare capacity is scarce, so the slightest expansion in supply generates a lot of extra demand. At the end of 2002 JCDecaux added about a hundred 2m² sites to its capacity, helping outdoor expand its market share to 3%, slightly more than the outdoor share in Germany.

Advertising leaflets (€5 million; 6% market share)

A country where distribution is king, Luxembourg has continued to invest in this type of promotional communication. Advertising leaflets are so well established in Luxembourg that, due to the size of their audience and the expenditure that is at stake, they can be considered as a medium in their own right, and will be treated as such here. The first investment area is specialised distribution (€2.9 million), which is the origin of the sector's growth (+18.5%) and accounts for 56% of the total increase of the medium.

It should be noted that advertising rates are based on the actual number of mailboxes supplied and that advertisers can directly check the efficiency of a campaign by the sales it generates. The same is true in France, where media capable of measuring returns on investments in the short term have fared well in 2003.

Sectors & advertisers

Luxembourg is unusual in that distributors, rather than brands, are the predominant advertisers. General or specialised distributors account for 35% of total expenditure. Growth in distribution advertising, at 11%, was well ahead of the market average of 3% in 2003. Finance (up 4%), tobacco (up 15%) and mail order (up by ten times, though with only a 0.5% market share) all grew ahead of the market in 2003.

Fast-moving consumer goods are practically invisible in Luxembourg, while they are among the largest advertisers abroad. Out of the 17 economic sectors, food ranks 11th and hygiene/beauty care ranks last.

2,049 advertisers (-5%) were active in 2003; their average budget was around €45,000 (+7%), but these percentages mask important discrepancies. The top 10 advertisers alone spent €16 million (17% of the total) but hardly increased their expenditure at all, while the market as a whole grew 3%. This suggests that the market is becoming less dependent on the largest advertisers. However, the top 30 advertisers accounted for almost 34% of all expenditure, while 1,205 spent less than €10,000 over the year.

Global market

The global market volume easily exceeded €123 million in 2003, showing high growth than display advertising market (4% compared to 3%). Growth in revenues other than from display (job ads, classified ads, public announcements, investment funds, etc.) tends to benefit the daily press more than other media.

As in 2002, the absence of a clear economic recovery continued to depress job advertising: expenditure in that sector declined by 24% overall in 2003, and by 11% in the daily press.

Despite the fact that the results of the global market are not of great interest for advertisers, they nonetheless reveal the importance of the volume of the information distributed, and indirectly the consumers' interest in the various media. And in that field, it is the daily press that distributes the most non-commercial information: out of a global expenditure of €31 million, the daily press receives €29 million, i.e. 94% of the total.

Conclusion

In 2003, the traditional antagonism between the press and audiovisual media no longer prevailed, replaced by the opposition between the promotional media and the image media. But it can be said that 2003 has been, generally speaking, a year that was more electronic (+€2.3 million) than typographic (+€0.8 million).

When comparing Luxembourg to its three neighbours, the rate of growth in ad expenditure is close to Germany (+3%) and France (+5%), but lags far behind Belgium (+11%), a country on which we closely depend for brands.

The overall economic situation continued to affect consumers confidence, who started to modify their buying habits by giving more importance to price; consequently, advertisers were cautious and more prone to use promotional communication forms than in the past, and even solutions favouring short-term returns on investments, as in France. The daily press continued to play a role in this type of communication, besides radio and advertising leaflets. It holds a comfortable position in terms of non-display revenues from inserts and remains, in all cases, largely dominant, with a market share at least equal to 41%.

In terms of advertising expenditure, the situation is more or less comparable to that of the audiences: in each medium there is a strong market leader

There is a clear relationship between the informative content distributed, the audience it receives and the advertising it attracts. A medium that carries an important volume of information is also capable of attracting readers, who constitute in turn a business asset that the medium can propose to its advertisers.

Christian STOEHR

On behalf of the Newspaper Publisher Association of Luxembourg (ALEJ)

Press bill

The foundations of the print press in Luxembourg still rest on



the 'Press Law of 20 July 1869'. Media developments made it necessary to revise these foundations and to give them a new juridical framework. To this end, the governmental council adopted on 21/12/2001 a bill on press freedom expression which was introduced before the chamber on 5/02/2002.

Its main characteristics are:

- Press freedom can be exercised through a medium
- the definition of a medium is very large and covers all technical aspects
- definition of the recognition of protection for journalistic sources
- the definition of a journalist is linked to the active exercise of the profession and cannot be subordinated to the sole possession of a professional journalistic card
- sphere of application of the press freedom law: it applies to anyone who expresses himself through a medium
- introduction of clauses in favour of the individuals implicated in a public communication distributed through a

medium:

- o respect of the presumption of innocence towards the implicated person
- o respect of privacy
- o conditions of the right to reply: right to rectification in case the name is quoted, but limited to the subject of the implication
- introduction of clauses promoting the exercise of press freedom
- o suppression of the « 'waterfall principle': journalist -> publisher -> printer -> distributor replaced by a principle of joint responsibility of publisher and journalist
- o clause of consciousness of the journalist in regards with its employer: in case of modification of the editorial line, the journalist can break the contract unilaterally and receive unemployment benefit
- obligation made to the publisher to reveal the transparency on its ownership structure.

POPULATION

Population by age and sex

	All individuals		Male		Female		Households 000
	000	%	000	%	000	%	
0-14	84	19	43	20	41	18	166
15-24	51	11	26	12	25	11	
25-34	67	15	34	15	34	15	
35-49	109	24	56	25	54	24	
50-64	73	16	37	17	36	16	
65+	63	14	26	12	37	16	
Total	448	100	221	100	227	100	

Source: Le STATEC

Population by social class

	All adults 15+	%
Executive manager/profession:	23.7	7
Middle manager	40.5	11
Craftsman/small retailer	3.6	1
Employee	62.1	17
Farmer/wine maker	2.9	1
Factory worker	53.0	15
Housewife	55.4	15
Pensioner	63.7	18
Unemployed/other	9.8	3
Student	38.8	11
No response	10.3	3
Total	363.8	100

Newspaper reach (%)

	Daily
All adults	65.0
Men	67.4
Women	62.7
MHS	67.1

MHS = Main Household Shopper
Source: TNS Plurimedia 2003

Age structure of readership

Age	% of readership	% daily reach within age group
15-24	9.5	43.8
25-34	16.1	56.7
35-49	28.9	62.2
50-64	23.7	76.5
65+	21.9	82.6

Daily newspapers only; includes imported titles.
Source: TNS Plurimedia 2003

Population by social class

	All adults 15+		Male		Female	
	000	%	000	%	000	%
Group 1	24	8	45	25	39	21
Group 2	100	33	39	22	38	20
Group 3	50	16	50	28	47	25
Group 4	3	1	32	18	51	28
No response	126	42	12	7	12	6
Total	303	100	178	100	186	100

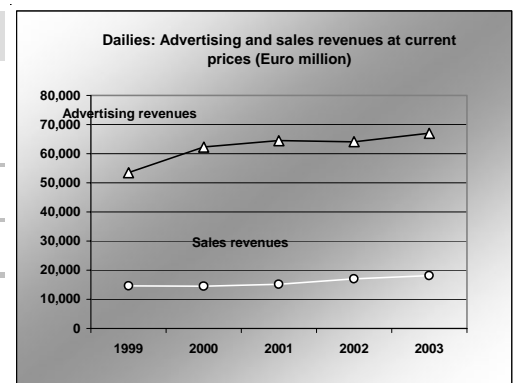
Source: TNS Plurimedia 2003

MORE FACTS

	1999	2000	2001	2002	2003	Change (%)	
						99/2003	2002/03
Advertising revenues (Euro 000)							
Dailies	53,512	62,324	64,482	64,095	67,017	25.24	4.56
Non-dailies & Sundays	2,810	3,967	5,792	3,241	5,423	92.96	67.32
Free papers	6,088	6,438	6,737	6,532	4,140	-31.99	-36.62
Sales revenues (Euro 000)							
Dailies	14,660	14,569	15,153	17,000	18,162	23.89	6.84
Volume of advertising sold (pages & page equivalents)*							
Total	9,539	10,271	10,609	12,038	13,223	38.62	9.84

Advertising is at gross ratecard prices

* Figures before 1999 are publishers' statements for the two main dailies. From 1999 figures are from Pige (Publinvest) and refer to dailies only.



Cover prices

	Euro
Single copy	0.55-0.90
Subscription*	0.38-0.54

* per issue

Media consumption (minutes per day, adults 15+)

	2001	2002	2003
Radio	209	195	194
Television	180	188	183

Source: TNS Plurimedia 2003



Internet publishing (No. of online editions)

	1999	2000	2001	2002	2003
Dailies	4	-	3	5	3
Non-dailies	5	-	7	7	5

Note: refers only to websites with editorial content

Internet publishing (No. of online editions)

	1999	2000	2001	2002	2003
Dailies	4	-	3	5	3
Non-dailies	5	-	7	7	5

Note: refers only to websites with editorial content

Employment

	1999	2000	2001	2002	2003
Total no. of journalists	268	289	90	104	257

Source: Mme Majerus Press Council No. 22 23 11

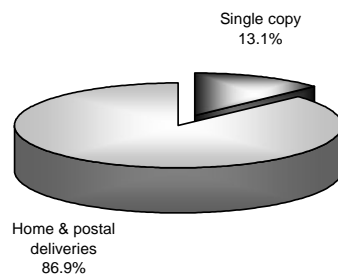
As of 9.12.2003 there were a total of 353 journalist in all media holding press cards. 257 worked for the print media, including 28 active journalists and trainees and 29 retirees. It is impossible to distinguish between part-time and full-time journalists; there are also several free-lance journalists who work for both audiovisual and print media.

Type of newspaper sales (%)

	Single copy	Home deliveries	Postal deliveries
1999	9.5	90.5	
2000	-	-	
2001	9.2	90.8	
2002	13.5		86.5
2003	13.1		86.9

Based on the two largest dailies 1999-2002, six dailies in 2003

Type of newspaper sales in 2003 (%)



Daily newspaper colour capability & formats

Number of:	1999	2000	2001	2002	2003
4-colour newspapers	4	-	7	6	5
Broadsheets	2	-	3	2	2
Tabloids	3	-	4	4	4
Other	-	-	-	-	6

Distribution and newsprint costs

	1999	2000	2001	2002	2003
As % of average cover price					
Single copy sales	-	-	38.0	38.0	38.0
Home deliveries	-	-	30.0	30.0	29.8
Postal deliveries	-	-	16.0	16.0	15.1
Average distribution cost per copy					
Subscription Euro	-	-	0.06	0.07	0.08
Single copy Euro	-	-	0.29	0.28	0.30
Newsprint costs (average per ton)					
Euro	-	558	644	590	535

These figures are difficult to estimate since several dailies provide no information

Top publishing companies (2003)

	Total circulation	Revenue (Euro)
Saint-Paul Luxembourg	79,908	12,449,799
Editpress	16,635	3,005,589
Lumedia	5,469	1,127,300
Editions Du Letzeburger Journal Zeitung	5,150	533,820
	8,000	1,045,992

Source: CIM, publishers' declarations

These were the five publishers of the six dailies in Luxembourg in December 2003. Only Saint-Paul Luxembourg and Editpress can be considered publishing groups as such, since these are the only publishers with more than one title

Contribution of classified, display and insert advertising to total advertising income (%) *

	1999	2000	2001	2002	2003
Display	90.1	90.3	56.4	58.2	56.8
Classified	5.9	5.0	38.7	41.8	43.2
Inserts	4.0	4.7	4.9	-	-

Source: Publinvest 2003

* Recruitment, personal, public announcements, legal and financial ads were all previously counted in display, but from 2001 they come under classified.

Inserts are now counted as display

Online readership

Newspaper	2004 *
Saint-Paul Luxembourg wort.lu	10,124

Source: CIM Metriweb AU

* number of page requests on 19/04/2004, from 2,268 unique visitors

Top ten advertising categories (2003)

Advertising sector	% of ad revenue
Retail	21.7
Culture, education & leisure	17.0
Other services	16.7
Auto	14.2
Wholesale	10.9
Banking/finance	5.7
Office/telecommunications	5.2
Drinks	3.1
Transport & tourism	2.3
Household	1.3

Source: Pige Publinvest 2003

Display advertising in daily press only

Top ten advertisers (2003)

Advertiser	Newspaper expenditure Euro (000)
Cactus	1,823
Losch (VW/Audi/Porsche)	1,162
Various events	1,047
Bram	738
Möbel Martin	662
Mercedes-Benz	658
Estate agents	573
Courtheoux Match	530
Miwwel & Kichechef	484
Banque Generale de Luxembourg	451

Source: Pige Publinvest 2003

Display advertising in daily press only



Top dailies (2003)

Title	Publisher	Circulation	Readership ^	Cover Price		Format	Full page rate (Euro)	
				Euro	US\$		Mono	Colour
Luxemburger Wort *	Saint-Paul Luxembourg	75,002	164,100	0.79	0.71	Nordic	5,775	8,925
Tageblatt **	Editpress	16,635	61,800	0.83	0.74	Berliner	2,245	4,170
Letzeburger Journal **	Editions du Letz. Journal	5,150	9,500	0.55	0.49	-	1,520	3,180
La Voix du Luxembourg *	Saint-Paul Luxembourg	4,906	22,600	0.58	0.52	Nordic	2,275	3,850
Le Quotidien **	Lumedia	5,469	24,700	0.80	0.72	Berliner	1,547	2,862
Zeitung vum Letzebuenger Vollek **	Zeitung	8,000	2,900	0.72	0.64	-	2,071	3,898

Source: CIM, TNS Plurimedia, publishers

^ total readership, not just average readership per issue or over any given period

* circulation based on four quarterly declarations made by publishers and audited by CIM

** circulation declared by publishers; not independently audited

NUMBER OF TITLES AND CIRCULATION

	1999	2000	2001	2002	2003	Change (%)	
						99/2003	2002/03
Number of titles							
Total dailies	5	5	7	6	6	20.00	0.00
Non-dailies	20	21	21	20	17	-15.00	-15.00
National non-dailies	9	10	9	10	10	11.11	0.00
Advertising non-dailies	11	11	12	10	7	-36.36	-30.00
Sundays	1	1	1	0	0	-100.00	-
Circulation (000)							
Total dailies	124	120	120	118	115	-7.12	-2.41
Non-dailies	431	0	469	423	385	-10.72	-9.08
National non-dailies	86	-	100	91	89	3.76	-2.19
Advertising non-dailies	345	-	369	332	296	-14.33	-10.97
Sundays	8	-	6	0	-	-	-
Total annual sales (millions of copies)							
Dailies	38.0	33.2	34.9	35.2	34.1	-10.26	-3.13

The size of the Grand Duchy (2,560 km²) leaves little opportunity for publishing profitable regional or local paid-for newspapers that are profitable; all newspapers are therefore national except the free advertising newspapers.

The regional free dailies (Ardenner Zeitung, Lokal Zeitung and Minett Zeitung) closed in 2003 when their publisher (XXL Medias) went bankrupt.

The 'advertising non-dailies' are newspapers whose aim and interest to readers is mainly - if not exclusively - advertising. Five of the seven advertising newspapers are free and distributed through mailboxes; the other two are paid-for and distributed through the postal system. The advertising newspapers are:

Luxpost-Weekend: weekly, free, resulting from the merger of 2 titles in 1/01/98

Lux-Bazar: weekly, paid-for

Bingo: weekly, paid-for

Regional Wort Norden: the same publishing and distribution characteristics as the Luxemburger Wort in the northern region

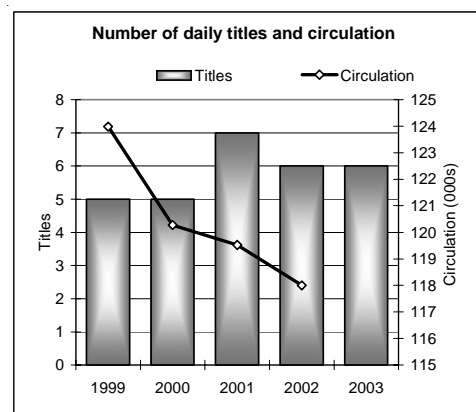
Sauer Zeitung: regional free publication

Musel Zeitung: regional free publication

Peitenger Wand: regional free publication (South)

For daily newspapers, circulation means paying circulation i.e. subscriptions + retail sales

For all other categories, circulation refers to print-run, due to the imprecision and lack of homogeneity of available information.



CROSS MEDIA OWNERSHIP

Owners	Regional TV	National TV	Regional Newspapers	National Newspapers	Radio
Regional TV Licensees	Yes	Yes	Yes	Yes	Up to 25% of share capital
National TV Licensees	Yes	Yes	Yes	Yes	Up to 25% of share capital
Regional Newspaper Owners	Yes	Yes	Yes	Yes	Up to 25% of share capital
National Newspaper Owners	Yes	Yes	Yes	Yes	Up to 25% of share capital
Satellite TV Broadcasters	Yes	Yes	Yes	Yes	Up to 25% of share capital
Local Radio Licensees	Yes	Yes	Yes	Yes	Up to 25% of share capital
National Radio Licensees	Yes	Yes	Yes	Yes	Up to 25% of share capital
Foreign Investors	Yes	Yes	Yes	Yes	Up to 25% of share capital

Note: two new television stations launched in 2004 - DOK TV and RTL ZWEE - both aimed at domestic audiences. Their licences were granted by the government of Luxembourg in conformity with the law on electronic media of 27 July 1991.



ADVERTISING EXPENDITURE & ECONOMIC DATA

Advertising expenditure

	(Euro mill, current prices)						
	1997	1998	1999	2000	2001	2002	2003
Newspapers	41.1	42.7	47.9	52.7	48.9	73.9	76.6
Magazines	3.5	3.5	3.9	4.3	7.5	12.2	10.3
Television	6.1	6.4	7.7	7.9	8.8	8.3	9.4
Radio	9.9	10.3	11.0	12.1	14.2	16.1	17.6
Cinema	0.8	0.9	1.3	1.2	1.1	-	1.1
Others	1.3	1.5	1.6	2.1	2.2	8.1	8.3
Total	62.8	65.3	73.6	80.3	82.7	118.6	123.3

Source: *Publinvest Display*

Notes: *Others' include bill posting but excludes below the line Based on ratecard prices*

Main economic indicators 1996-2002

	1996	1997	1998	1999	2000	2001	2002
1 US\$= 1.12 Euro at 2002 rate							
Gross Domestic Product (Euro million)							
at current prices	13,969	15,483	16,254	18,600	21,300	22,100	22,300
% change	4.6	10.8	5.0	14.4	14.5	3.8	0.9
at 2001 prices	15,154	16,567	17,225	19,523	21,674	22,100	-
% change	3.2	9.3	4.0	13.3	11.0	2.0	-
Gross Domestic Product per capita (Euro 000)							
at current prices	33.3	36.9	37.8	43.3	48.4	50.1	-
at 2001 prices	36.1	39.4	40.1	45.4	49.3	50.1	-
Population							
Millions	0.4	0.4	0.4	0.4	0.4	0.4	0.4
Consumer Price Index							
2001=100	92.2	93.5	94.4	95.3	98.3	100.0	-
% change	1.4	1.4	1.0	1.0	3.1	1.8	-
Ad.spend as % of GDP	0.42	0.41	0.40	0.40	0.38	0.37	0.53
Advertising Expenditure Growth (%)	6.2	7.0	4.0	12.6	9.2	3.0	43.4

Sources: *Publinvest, Statec*

Research

Circulation is audited by: CIM (Centre d'Information sur les Médias, Brussels).

Readership is measured by: TNS Plurimedia (Taylor-Nelson/SOFRES)

Methodology: Two audience measurement surveys took place in 2003: TNS Plurimedia and ILRES AUDIOVISUAL 2003.

TNS Plurimedia (owned by the Taylor-Nelson/SOFRES Group) conducts private research commissioned by an external body, a joint venture between the Saint-Paul Luxembourg and Editpress publishing groups. It includes all daily, weekly, bimonthly and monthly publications; radio; television; cinema and advertising leaflets. It excludes print titles published less often than monthly and outdoor advertising. 2,299 interviews were conducted with a sample representative of the population aged over 15. The interviews were conducted using the CATI system by random selection between 22 April and 13 July 2003.

ILRES AUDIOVISUAL 2003 (3,564 telephone interviews using the CATI system between September 2002 and June 2003) was subdivided into two parts - ILRES RADIO and ILRES TV. ILRES RADIO was private research commissioned by an external body created by several broadcasters (RTL, Eldorado and 100.7), while ILRES TV was private research commissioned by an external body created by RTL only. Both parts were conducted in conjunction with each other.

Taxes

VAT on: sales 3%
advertising 12%
newsprint 15%
plant 15%
composition 12%
(standard VAT rate 15%)

VAT on printing is imposed at the following rate: 3% on brochures, books, newspapers and periodicals; 12% on commercial catalogues or printed advertising matter; and 15% on calling cards.

Newspapers are subject to the usual corporation tax on profits, which is 30%.

Subsidies

Are there subsidies for the purchase of newsprint? There is no specific aid for newsprint purchases; all aid is included in the direct press subsidy.

Are loans granted at low interest rates for re-equipping or improving existing equipment? There are no specific low-rate loans available to the printing or publishing sectors; only industrial and commercial companies are eligible for low-rate loans, which are granted by the SNCI (Société Nationale de Crédit et d'Investissement).

Are direct subsidies available to newspapers? The 3/08/1998 law promoting print media provides for subsidies, the amount of which is decided each year. In 2003 €6,040,984 was distributed to all print media; €5,482,503 went to all newspapers, and €4,837,886 went to the six daily newspapers.

Discounts

on: post * rail 0 telephone 0 telegraph 0 telex 0

* Fixed special rate. Tariff on distribution by the P&T is Euro 12.10 per 75 grams plus a one-off fixed tax of 0.25%.

Ownership

Does any law exist governing publishing-house ownership, or the registration of shares in newspaper-publishing companies? No

Is there any law prohibiting or restricting foreign companies or individuals from owning shares, and in particular, the majority of shares, of domestic daily newspapers? No

Is there any law prohibiting daily newspaper or periodical publishers from operating radio or television stations in the same locality? The participation of a newspaper business in a regional radio station may not exceed 25% of the station's capital.

So as to guarantee disclosure and transparency in the capital structure and to avert silent partnerships, is there a law or rule making it possible to determine who actually owns a publishing company? No

Is there an antitrust law limiting concentration in the daily press? No

Is further regulation of media concentration expected? No

General economic situation

GDP total US\$8.6 billion; GDP per capita US\$18,298 (purchasing power parity; 2002). Consumer price index 97.3 (2002).

Performance of newspapers vs. other media

There are three television networks. Television broadcasts also are received from Hong Kong and widely watched by Macau residents. Macau Radio broadcasts in both Portuguese and Chinese (Cantonese and Mandarin).

Performance of different types of newspapers

The print media include eight Chinese-language dailies, four Portuguese-language dailies, and seven weeklies. Hong Kong and international newspapers are freely available. The dominant newspapers are sympathetic to official Chinese positions in their editorial line.

Media/press laws

The reversion to People's Republic of China sovereignty has

produced no overt or apparent restrictions of press freedom. Government officials asserted that the local press has grown more aggressive in its demands for accountability from public officials since the 1999 handover.

Article 23 of the Basic Law obliges the Special Administrative Region to enact legislation that would forbid any act of treason, secession, sedition, subversion against the Central People's Government, or theft of state secrets, and links of the foregoing nature that are harmful to national security with foreign political organisations.

Particular concern has been raised regarding the Penal Code's lack of specific sentences for such crimes. A legal vacuum was created when a Portuguese law dealing with crimes against state security became null and void after the handover.

Sources: CIA - The World Factbook 2003; US State Department; WAN from public sources

POPULATION

Population by age and sex

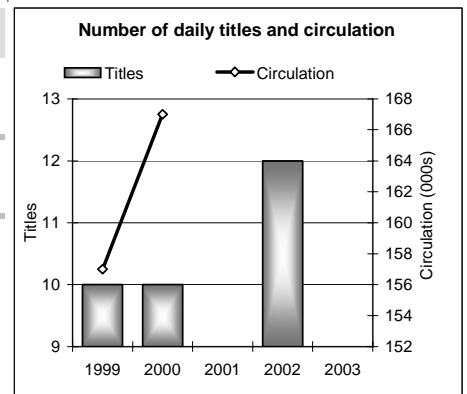
	All individuals		Male		Female	
	000	%	000	%	000	%
0-14	98	21	51	23	47	19
15-64	338	72	160	71	178	73
65+	34	7	14	6	20	8
Total	470	100	225	100	245	100

Source: CIA - The World Factbook 2003

NUMBER OF TITLES AND CIRCULATION

	1999	2000	2001	2002	2003	Change (%)	
						99/2003	2002/03
Number of titles							
Total dailies	10	10	-	12	-	-	-
Non-dailies	8	7	-	-	-	-	-
Circulation (000)							
Total dailies	157	167	-	-	-	-	-
Non-dailies	24	20	-	-	-	-	-

Source: UNESCO; WAN from public sources



MORE FACTS

Top ten dailies (2003)

Title	Publisher (Language)	Circulation (000)
Aomen Ribao (Macau Daily News)	sponsored by the Communist Party of China (in Chinese)	50
Jornal Va Kio (Overseas Chinese)	(in Chinese)	-
Tai Chung Pou (The People)	(in Chinese)	-
Jornal do Cidadao (The Citizen)	(in Chinese)	-
Jornal In Toi Ou Mun (Modern Macau)	(in Chinese)	-
Cheng Pou (Rightness)	(in Chinese)	-
Seng Pou (The Star)	(in Chinese)	-
Jornal San Va Ou (New Chinese Macau)	(in Chinese)	-
Macau Hoje (Macau Today)	(in Portuguese)	-
Jornal Tribuna de Macau (Macau Forum)	(in Portuguese)	-

Source: WAN from public sources

Commentary - Association of Printed Media and News Agencies of Macedonia (APMNAM)

There were no big changes to the economy in 2003, except that the buying power of consumers declined further and industrial production was down 35% year-on-year. However, newspapers are very cheap, so everyone can afford them; most newspapers are in the popular tabloid format.

Like in many other countries, TV is in an advantageous position in Macedonia compared to newspapers and other media.

New newspaper *Vreme* was launched in 2003. Aimed at younger readers, which were not buying newspapers before, it has helped increase overall newspaper circulation (*Vreme's*

circulation is not audited, so this is not based on actual figures). Readership was down 2% in November 2003, compared to October 2002. All newspapers are publishing online editions.

German group WAZ is the new owner of three high-circulation newspapers: *Dnevnik*, *Vest* and *Utrinski vesnik*. The four daily newspapers from the ex-state-owned publishing house Nova Makedonija were sold to private investors, and some of them are currently closed for restructuring.

The government has terminated state support for newspapers in 2004.

POPULATION

Population by age and sex

	All individuals		Male		Female		Households 000
	000	%	000	%	000	%	
Children	459	23	237	23	223	22	502 *
16-24	294	15	151	15	143	14	
25-34	302	15	154	15	148	15	
35-44	297	15	151	15	145	14	
45-54	270	13	136	13	134	13	
55-64	185	9	90	9	95	9	
65+	215	11	97	10	118	12	
Total	2,023	100	1,015	100	1,007	100	

Source: Census of the Population, Households and Dwellings, 2002

* 2001 data

Newspaper reach (%)

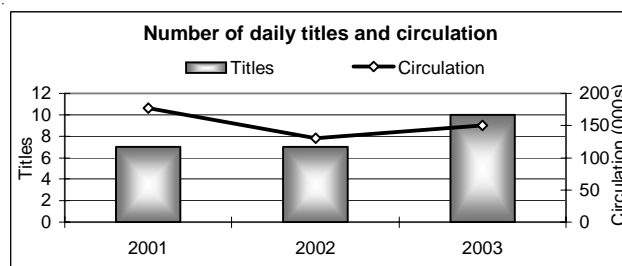
	Daily
All adults	52.3

NUMBER OF TITLES AND CIRCULATION

	2001	2002	2003	Change (%) 2002/03
Number of titles				
Total dailies	7	7	10	42.86
Non-dailies	33	30	9	-70.00
Circulation (000)				
Total dailies	177	130	150	15.38
Non-dailies	60	60	12	-80.00
Total annual sales (millions of copies)				
Dailies	41.6	40.6	46.8	15.38

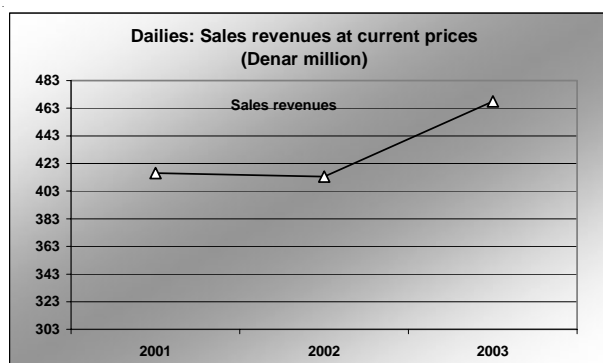
Note: The majority of non-APMNAM-member publications are better classed as magazines.

Figures are APMNAM estimates



MORE FACTS

	2001	2002	2003	Change (%) 2002/03
Advertising revenues (Denar million)				
Dailies	-	308	-	-
Sales revenues (Denar million)				
Dailies	416	413	468	13.21
Volume of advertising sold (pages & page equivalents)				
Total	-	10,000	-	-



Internet publishing (no. of online editions)

	2003
Dailies	6
Non-dailies	3

Source: APM

Cover prices

	Denar
Single copy	10
Subscription	10



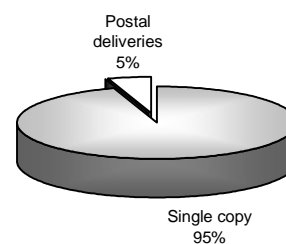
Newspaper colour capability & formats

Number of:	2001	2002	2003
4-colour newspapers	1	2	7
Broadsheets	1	1	1
Tabloids	6	5	5
Other	-	1	1

Type of newspaper sales (%)

	Single copy	Postal deliveries
2001	95	5
2002	90	10
2003	95	5

Type of newspaper sales in 2003 (%)



Top dailies (2002)

Title	Publisher	Circulation (000)	Cover Price		Format
			Denar	US\$	
Dnevnik	Krug d.o.o.	50	10.00	0.16	tabloid
Utrinski	Most d.o.o.	30	10.00	0.16	berliner
Vest	Vest	30	10.00	0.16	tabloid
Vecer	NIP Nova Makedonija	5	10.00	0.16	tabloid
Makedonija Denes	MakDenes	5	10.00	0.16	tabloid
Nova Makedonija	NIP Nova Makedonija	5	10.00	0.16	broadsheet
Makedonski sport	Unika M	5	15.00	0.23	tabloid

Distribution and newsprint costs

	2001	2002	2003	
As % of average cover price				
Single copy sales	30	25	95	
Postal deliveries	*	20	5	
Average distribution cost per copy				
Subscription	Denar	2.00	2.00	-
	Euro	0.03	0.03	-
Single copy	Denar	3.30	2.50	-
	Euro	0.05	0.04	-
Newsprint costs (average per ton)				
Local currency	34,770	36,900	30,000	
Euro	570	600	495	

* postal distribution is generally expensive, which explains why it is little used

Top ten publishing companies (2003)

(ranked by total circulation)

Vreme
Krug
Ogledalo
Most
Makedonski Sport
Vecer
Makedonija Denes
Oglasnik M
Fokus
Fakti

Source: APM

Top ten advertisers (2002)

Advertiser
Mobimak
Makedonski Telekomunikacii
Skopsko Beer
Germanos
Coca-Cola
Alkaloid
Toyota
Peugeot
Fiat
Citroen

Source: Agency estimates

Top ten advertising categories (2002)

Advertising sector
Telecommunications
Auto
Beverages
Banks
Electronics
Computers
Hygiene/toiletries
Cosmetics
Fairs
Ministries/government agencies

Source: Agency estimates

ADVERTISING EXPENDITURE & ECONOMIC DATA

Main economic indicators 1993-1999

	1993	1994	1995	1996	1997	1998	1999
1 US\$= 64.35 Denar at 2002 rate							
Gross Domestic Product (Denar billion)							
at current prices	59,165	146,409	169,521	176,444	184,982	190,827	195,284
% change	-	147.5	15.8	4.1	4.8	3.2	2.3
at 1999 prices	160,791	175,554	174,607	176,959	183,556	188,268	195,284
% change	-	9.2	-0.5	1.3	3.7	2.6	3.7
Gross Domestic Product per capita (Denar 000)							
at current prices	27,908	68,415	78,482	88,222	92,491	95,414	97,642
at 1999 prices	75,845	82,035	80,836	88,480	91,778	94,134	97,642
Population							
Millions	2.1	2.1	2.2	2.0	2.0	2.0	2.0
Consumer Price Index							
1999=100	36.8	83.4	97.1	99.7	100.8	101.4	100.0
%change	337.7	126.6	16.4	2.7	1.1	0.6	-1.3

Source: IFS, ZenithOptimedia

**Research**

Circulation is not audited.

Readership: BRIMA Gallup

Method: Interviews are carried out once a year with a sample of 1,600 people.

Taxes

VAT on:

sales 5%	advertising 18%
newsprint 18%	plant 18%
composition 18%	(standard VAT rate: 18%)

There are no tax concessions for newspaper companies.

Subsidies

In 2003, government subsidies totalled 56 million Denar. The government has decided to erase the newspaper subsidies from the 2004 Budget.

Discounts

on: post 0 rail 0 telephone 0 telegraph 0 telex 0

Ownership

Does any law exist governing publishing-house ownership, or the

registration of shares in newspaper-publishing companies? No

Is there any law prohibiting or restricting foreign companies or individuals from owning shares, and in particular, the majority of shares, of domestic daily newspapers? No

Is there any law prohibiting daily newspaper or periodical publishers from operating radio or television stations in the same locality? Newspaper publishers cannot operate radio or TV stations.

So as to guarantee disclosure and transparency in the capital structure and to avert silent partnerships, is there a law or rule making it possible to determine who actually owns a publishing company? Joint Stock companies must register their shares at the Central Registry. However, most publishing companies are registered as Limited, so they are not under this rule.

Is there an antitrust law limiting concentration in the daily press? There are no special rules for newspapers, but normal anti-monopoly laws apply.

Is further regulation of media concentration expected? No

MADAGASCAR

General economic situation

GDP total US\$12.59 billion; GDP per capita US\$741 (purchasing power parity; 2002). Consumer price index 107.4 (2002).

Performance of newspapers vs. other media

The government owns the only nationwide television and radio networks. There were more than 175 privately owned radio and television stations at the end of 2001; however, federal regulations restricted them from providing nationwide coverage.

In 2002, the former Minister of Information cut off all transmissions from the state-owned Television Malagasy (TVM) and the state-owned national radio (RNM) after some of their commentators broadcast news of President

Ravalomanana's first inauguration. The state-owned media stayed off the air for several weeks and then reopened. Some provincial affiliates preferred not to broadcast for fear of local reprisals.

Performance of different types of newspapers

There are four privately owned national daily newspapers and many other privately owned national and local news publications that are published less frequently.

Readership

In a country with a literacy rate of approximately 54%, the influence of print media is minimal.

Sources: CIA – *The World Factbook 2003*; US State Department

POPULATION & MORE FACTS

Population by age and sex

	All individuals		Male		Female	
	000	%	000	%	000	%
0-14	7,632	45	3,824	45	3,808	45
15-64	8,819	52	4,367	52	4,452	52
65+	529	3	243	3	286	3
Total	16,980	100	8,434	100	8,546	100

Source: CIA 2003

	2002
Number of dailies	4

Source: WAN from public sources

Top dailies (2002)

Title	F = French M = Malagasy
Midi Madagasikara (F)	
La Gazette de la Grande Ile (F/M)	
Madagascar Tribune (F)	
L'Express de Madagascar (F)	

Source: WAN from public sources

MALAWI

General economic situation

GDP total US\$6.811 billion; GDP per capita US\$585 (purchasing power parity; 2002). Consumer price index 127.4 (2001).

Performance of newspapers vs. other media

The state-owned Malawi Broadcasting Corporation controls television and most radio service. There are 10 private radio stations; all broadcasting on FM frequencies with limited coverage and only in urban areas. There are two commercial stations broadcasting in Blantyre. There is a rural community radio station run by local women with the help of the Malawi Media Women's Association. Six religious stations broadcast in the capital and other major cities. Government-owned Television Malawi (MBC-TV) is the country's sole television broadcaster.

Performance of different types of newspapers

There are two dozen newspapers in Malawi. The two main

dailies – the *Nation* and the *Daily Times* – are controlled by the ruling party and the main opposition party respectively. The Blantyre Newspapers Ltd., the publisher of the *Daily Times*, also publishes the weekly *Malawi News*.

Printing plants

The biggest printing press – the Blantyre Print and Publishing – belongs to the business empire of the late president Kamuzu Banda. Set up in 1962, this press prints both newspapers and books. The other major printing press in the newspaper sector is owned by Aleke Banda's Nation Publications Ltd. There is also a chain of small printers dotted around the country, most of them owned by Indian business tycoons.

Sources: CIA – *The World Factbook 2003*; Freedom House; US State Department; WAN from public sources

POPULATION & MORE FACTS

Population by age and sex

	All individuals		Male		Female	
	000	%	000	%	000	%
0-14	5,446	47	2,748	47	2,698	46
15-64	5,886	51	2,912	50	2,974	51
65+	320	3	129	2	191	3
Total	11,652	100	5,789	100	5,863	100

Source: CIA – *The World Factbook 2003*

Top dailies (2003)

Title	Publisher	Circulation (000)
The Nation	Nation Publications	70.0
The Daily Times	Blantyre Newspapers Ltd.	40.5

Source: WAN from public sources

	2002
Number of titles	
Total dailies	2
National dailies	2

Source: WAN from public sources

Commentary – Macomm

The Malaysian economy grew by 5.2% in 2003, ahead of the 1.4% growth in 2002. Considering that the first half of 2003 was marred by the Iraq war and SARS, the Malaysian economy has proven to be resilient. Growth was more apparent in the third quarter of 2003, when the economy expanded by 5.1%.

Advertising expenditure was fuelled by the resilient economy in 2003. It was, however, affected by the general economic situation and the first year of a total advertising ban on tobacco. For 2003, advertising expenditure reached 8% growth, exceeding an earlier forecast of 3%. Press continues to have a strong hold over TV, taking up 64% of total adspend; TV's share remains at a low of 27%. Up to 2002, adspend was dominated by tobacco advertisers. At least a dozen newspapers have announced advertising rate increases for 2004, signalling a continuation of the strong newspaper market.

POPULATION

Adult population by age and sex

	Adults		Male		Female		Households 000
	000	%	000	%	000	%	
15-17	1,393	11	681	10	712	11	4,800*
18-19	625	5	340	5	285	4	
20-24	1,692	13	852	13	840	13	
25-29	1,486	11	739	11	747	12	
30-34	1,433	11	712	11	721	11	
35-39	1,404	11	699	11	705	11	
40-49	2,291	18	1,161	18	1,130	17	
50+	2,669	21	1,319	20	1,350	21	
Total	12,993	100	6,503	100	6,490	100	

Source: Macomm

* 2002 data

Households

	Adults 000
without children	7,648
with children under 15	5,345
Total	12,993

Age structure of readership

Age	% of readership	% reach within age group
15-24	29	56
25-34	24	55
35-39	12	55
40-49	19	55
50+	16	42

Newspaper reach (%)

	Daily
Adults	51.4
Men	57.6
Women	45.2
MHS	45.1

Source: Macomm

In 2003 the first free tabloid was launched – the *Sun*, owned by Nexnews media group, which also owns the leading weekly business and investment newspaper, *The Edge*. Nexnews incorporated the new *Financial Daily* as a pullout in the *Sun* and distributed it freely to readers.

In 2003, the Iraq war, SARS, violent crimes and the start of a new leadership propelled newspaper readership, especially among secondary newspapers, to significant growth levels. The *Sun* was up 33%, *China Press* (+20%), *Harian Metro* (+39%) and *Tarnil Nesan* (+61%). The readership of the dailies grew by 4% overall.

Star Publications (publisher of the number one English daily, the *Star*, magazines and Star online) expanded its print interests to include radio.

Households (occupancy)

	Households 000
1-3 adults	6,918
4-6 adults	5,368
7+ adults	708
Total	12,994

Housewives (co-habiting persons)

Age	Married females 000
Under 25	153
25-34	785
35-39	468
40-49	698
49+	714
Total	2,818

Adult population by sex and social class

	Adults		Male		Female	
	000	%	000	%	000	%
A + B	692	5	477	8	215	3
C1	2,108	17	1,221	19	887	14
C2	3,600	29	2,778	44	822	13
D/E	6,203	49	1,832	29	4,371	69
Total	12,603	100	6,308	100	6,295	100

Source: Macomm

A = Upper middle class - higher managerial, administrative or professional
B = Middle class - intermediate managerial, administrative or professional
C1 = Lower middle class - supervisory or clerical, and junior managerial, administrative or professional

C2 = Skilled working class - skilled manual workers

D = Working class - semi and unskilled manual workers

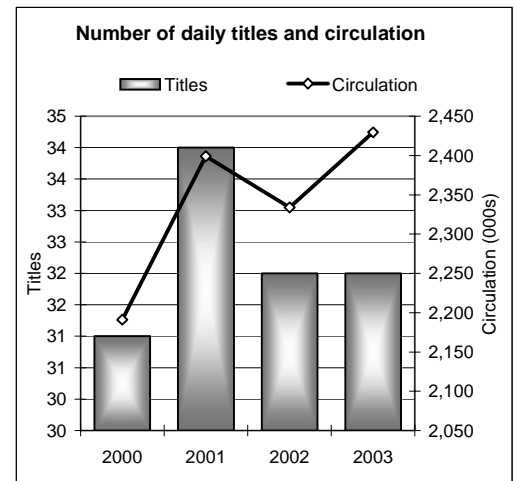
E = Those at lowest levels of subsistence - state pensioners or widows (no other earners)



NUMBER OF TITLES AND CIRCULATION

	2000	2001	2002	2003	Change (%)	
					2000/03	2002/03
Number of titles						
Total dailies	31	34	32	32	3.23	0.00
<i>National dailies</i>	14	15	14	14	0.00	0.00
<i>Regional and local dailies</i>	17	19	18	18	5.88	0.00
Non-dailies	1	2	2	2	100.00	0.00
Sundays	30	14	14	32	6.67	128.57
Free papers	-	-	1	1	-	0.00
Circulation (000)						
Total dailies	2,191	2,399	2,334	2,429	10.88	4.09
<i>National dailies</i>	1,862	1,938	1,941	2,002	7.53	3.15
<i>Regional and local dailies</i>	329	461	393	427	29.83	8.72
Non-dailies	17	40	120	69	306.71	-42.38
Sundays	2,548	2,384	2,395	2,957	16.06	23.48
Free papers	-	-	140	143	-	1.89
Total annual sales (millions of copies)						
Dailies	657	720	700	-	-	-
Non-dailies	-	-	-	-	-	-
Sundays	132	124	125	-	-	-

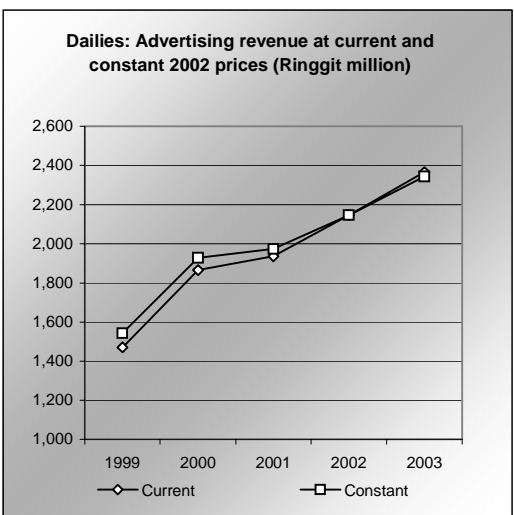
Source: Macomm



MORE FACTS

	1999	2000	2001	2002	2003	Change (%)	
						99/2003	2002/03
Advertising revenues (Ringgit million)							
All newspapers	1,471	1,866	1,936	2,146	2,365	60.81	10.23
All newspapers §	1,543	1,928	1,973	2,146	2,344	51.91	9.24

§ at constant 2002 prices



Contribution of classified and display advertising to total advertising income (%)

	2001	2002	2003
Display	77.0	77.5	77.4
Classified	23.0	22.5	22.6

Distribution and newsprint costs

	1999	2000	2001	2002	2003
As % of average cover price					
Single copy sales	20	20	20	15	20
Home deliveries	-	-	20	15	-
Average cost per copy					
Single copy	Ringgit	-	-	0.18	0.20-0.25
Subscription	Ringgit	0.20	0.25	-	0.18
Newsprint costs (average per ton)					
Ringgit	-	1,990	2,660	-	-

Top ten advertising categories (2003)

Advertising sector	% of display ad revenue
Telecommunications	14
Auto	10
Clothes/jewellery/photography	9
Finance	9
Corporate government agencies/utilities	8
Education/book stores	7
Media/publishers	6
IT	6
Household equipment	5
Household supplies	4

Source: Macomm

Top publishing companies (2003)

(ranked by total circulation *)

New Straits Times Press
Pemandangan Sinar
Nanyang Press Holdings
Star Publications
Utusan Melayu

* excluding Sunday circulation

Top ten advertisers (2003)

Advertiser	Newspaper expenditure RM (000s)
Maxis	48,270
Celcom	34,346
Digi Telecom	33,888
Telekom Malaysia	20,850
Guinness Anchor	20,129
Citibank	17,728
Petronas	15,578
New Straits Times Press	15,328
Talam Corporation	14,085
Carlsberg	13,885

Source: Macomm



Newspaper colour capability & formats

Number of:	2001
4-colour newspapers	34
Broadsheets	30
Tabloids	4

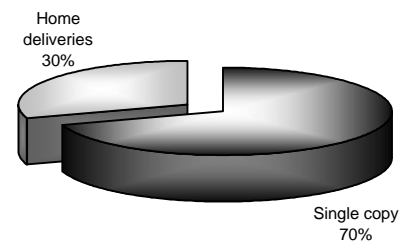
Cover prices

	RM
Single copy	1.00-1.50

Type of newspaper sales (%)

	Single copy	Home deliveries
1999	70	30
2000	70	30
2001	70	30
2002	70	30
2003	70	30

Type of newspaper sales in 2003 (%)



Top ten dailies (2003)

E = English C = Chinese B = Bahasa		Circulation (000)	Readership (000)	Cover Price*		Format	Full page rate (RM)	
Title	Publisher			RM	US\$		Mono	Colour
Sin Chew Jit Poh (C)	Pemandangan Sinar	342	977	1.20	0.32	Broadsheet	21,200	26,500
The Star (E)	Star Publications	307	1,123	1.20	0.32	Tabloid	14,504	25,500
Utusan Malaysia (B)	Utusan Melayu	246	1,470	1.20	0.32	Broadsheet	21,600	32,600
Berita Harian (B)	New Straits Times	228	1,422	1.20	0.32	Broadsheet	20,520	31,520
China Press (C)	Nanyang Press	200	673	1.20	0.32	Broadsheet	12,614	23,000
Harian Metro (B)	New Straits Times	159	831	1.00	0.26	Tabloid	5,808	11,808
Nanyang Siang Pau (C)	Nanyang Press	150	365	1.20	0.32	Broadsheet	12,614	21,000
New Straits Times (E)	New Straits Times	135	375	1.20	0.32	Broadsheet	18,360	29,360
Guang Ming Ribao	Pemandangan Sinar	102	396	1.00	0.26	Broadsheet	13,780	19,080
Kwong Wah Yapoh	Kwong Wah Yit Poh	68	268	1.00	0.26	Broadsheet	6,625	17,490

Source: Macomm

Media consumption (minutes per day)

Adults	2003
National newspapers	67.6
Magazines	31.2
Radio	66.3
Television	88.8

Source: Macomm

Online readership (page impressions per month)

Newspaper	2001	2002
The Star	17,279,443	21,491,123
NST	-	12,741,665
Sin Chew	16,897,831	12,525,758
Utusan	4,417,500	4,250,118
Emedia	8,582,475	-
China Press	739,647	-
Miridaily	17,746	-

Internet publishing (No. of online editions)

	2001	2002
Dailies	10	14

ADVERTISING EXPENDITURE & ECONOMIC DATA

Advertising expenditure

(Ringgit million, in current prices)

	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
Newspapers	1,408	1,585	1,260	1,471	1,866	1,936	2,188	2,276	2,503	2,753	3,029
Magazines	120	137	111	104	131	183	158	163	171	179	188
Television	774	780	698	823	936	878	921				
Radio	71	67	56	85	102	120	144				
Cinema	7	9	11	10	10	11	10				
Outdoor	65	68	54	59	62	70	74				
Total	2,445	2,646	2,190	2,552	3,107	3,198	3,495	3,622	3,923	4,303	4,721

Source: 1996-2002 AC Nielsen, 2003-2006 ZenithOptimedia

Notes: Excludes production costs, includes classified advertising and agency commission, before discounts

Main economic indicators 1996-2002

	1996	1997	1998	1999	2000	2001	2002
1 US\$=	3.80						
Gross Domestic Product (RM billion)							
at current prices	254	282	283	301	343	334	361
% change	14.1	11.1	0.5	6.2	13.9	-2.4	7.9
at 2002 prices	296	320	305	324	354	341	361
% change	10.2	8.2	-4.5	6.2	9.1	-3.7	5.9
Gross Domestic Product per capita (RM 000)							
at current prices	12.0	13.0	12.8	13.2	14.7	14.8	15.9
at 2002 prices	14.0	14.8	13.8	14.3	15.2	15.1	15.9
Population							
Millions	21.2	21.7	22.2	22.7	23.3	22.6	22.6
Consumer Price Index							
2002=100	85.9	88.1	92.7	92.7	96.8	98.1	100.0
% change	3.5	2.6	5.3	5.3	1.6	1.4	1.9
Ad.spend as a % of GDP							
	0.96	0.94	0.77	0.85	0.91	0.96	0.97
Advertising Expenditure Growth (%)							
at current prices	20.8	8.2	-17.2	16.5	21.7	2.9	9.3
at 2002 prices	16.7	5.5	-21.4	13.4	19.9	1.5	7.2

Source: IFS, ZenithOptimedia

Research

Circulation is audited by: Audit Bureau of Circulations (ABC)
Readership is measured by: NMR

Taxes

There is a 5% tax on advertising and a 28% tax on profits, which is the normal rate for all private companies.

Discounts

on: post 0 rail 0 telephone 0 telegraph 0 telex 0

MALDIVES

General economic situation

GDP total US\$1.25 billion; GDP per capita US\$3,788 (purchasing power parity; 2002). Consumer price index 101 (2002).

Performance of newspapers vs. other media

Most major media outlets were owned either by the government or its sympathizers. The government owned and operated the only television and radio stations. It did not interfere with foreign broadcasts or with the sale of satellite receivers. Reports drawn from foreign newscasts were aired on the government television station. Cable News Network (CNN) was shown daily, uncensored, on local television.

Performance of different types of newspapers

Almost 200 newspapers and periodicals were registered with the government, only some of which published on a regular basis. *Aafathis*, a morning daily, often was critical of government policy, as was the *Monday Times*, a weekly English-language magazine. Two dailies – *Miadh* and *Haveeru* – were pro-government. *Haveeru* is the leading daily newspaper in the Maldives with the largest circulation. Local dailies which publish in the Divehi language have some English-language pages and concentrate on local and regional topics. Several local periodicals are published, mainly in Maldivian.

Media/press laws

The law prohibits public statements that are contrary to Islam, threaten the public order, or are libellous. The Penal Code prohibits inciting citizens against the government. However, an amendment to the Penal Code decriminalised “true account(s)” by journalists of governmental actions.

Regulations that make publishers responsible for the content of the material they published remain in effect, but no legal actions against publishers were initiated during the year.

Press council

The Press Council is composed of lawyers, private and government media representatives, and other government officials. The Council reviews charges of journalistic misconduct (advising the Ministry of Information, Arts, and Culture on measures to be taken against reporters, when appropriate) and promotes professional standards within the media by recommending reforms and making suggestions for improvement.

Sources: CIA – *The World Factbook 2003*; US State Department; BBC News; WAN from public sources

POPULATION & MORE FACTS

Population by age and sex

	All individuals		Male		Female	
	000	%	000	%	000	%
0-14	148	45	76	45	72	45
15-64	172	52	88	52	84	52
65+	10	3	5	3	5	3
Total	330	100	169	100	161	100

Source: CIA – *The World Factbook 2003*

	2002
Number of titles	
Total dailies	3
National dailies	3

Source: WAN from public sources

Top dailies (2003)

Title
Haveeru
Aafathis News
Miadh News

Source: WAN from public sources

MALI

General economic situation

GDP total US\$9.775 billion; GDP per capita US\$841 (purchasing power parity; 2002). Consumer price index 104.5 (2002).

Performance of newspapers vs. other media

The government controls the only television station and one of more than 130 radio stations; however, all present a wide range of views. The relative expense of newspapers and television, coupled with a low literacy rate, makes radio the most prevalent medium of mass information and communication. There are as many as 15 private radio stations in Bamako, and there are approximately 117 additional stations throughout the country. In addition to commercial radio stations, private or community radio broadcasters include those run by associations and others directed toward smaller villages.

A number of foreign broadcasters operate in Bamako through local media. These include Radio France Internationale, Africa No. 1, and the British Broadcasting Corporation; all have frequency modulation (FM) frequencies. Voice of America has a local FM affiliate.

Domestic reception and distribution of foreign satellite and cable television are permitted and fairly widespread,

especially in Bamako. There are no private television stations that broadcast domestically produced programs.

Performance of different types of newspapers

There are more than 30 private newspapers and journals in French, Arabic, and local languages throughout the country, and there are as many as 20 newspapers in Bamako. There are 10 or more daily newspapers and many others are biweeklies; six are privately owned of which one, *Les Echos*, is allied with the former ruling party and one is government-controlled *L'Essor*.

Media/Press Laws

All newspapers are required to register with the Ministry of Communications; however, registration is not complicated and can be completed quickly.

The law regulates the press and provides for substantial criminal penalties, including imprisonment, for libel and for public injury to the Head of State, other officials, and foreign diplomats; these laws leave injury undefined and subject to judicial interpretation. However, the government has never prosecuted journalists on criminal libel charges.

The Minister of Territorial Administration and Local Collectivities can prohibit religious publications that he



concludes defamed another religion; however, there were no reports of instances in which publications were prohibited in 2002.

State support
Private and community radio services enjoy special tax advantages.

Sources: CIA – The World Factbook 2003; US State Department

POPULATION & MORE FACTS

Population by age and sex

	All individuals		Male		Female	
	000	%	000	%	000	%
0-14	5,487	47	2,760	48	2,727	46
15-64	5,789	50	2,772	49	3,017	51
65+	350	3	162	3	188	3
Total	11,626	100	5,694	100	5,932	100

Source: CIA 2003

Distribution costs

	1995	1996	1997	1998	1999
As % of average cover price					
Single copy sales	15	15	20	20	20

Top dailies (2002)

Title

L'Aurore
L'Essor
Le Republicain
Info Matin

Source: WAN from public sources

ADVERTISING EXPENDITURE & ECONOMIC DATA

Main economic indicators 1996-2002

	1996	1997	1998	1999	2000	2001	2002
1 US\$= 696.99							
Gross Domestic Product (CFA Francs billion)							
at current prices	1,319	1,423	1,594	1,671	1,742	2,074	-
% change	14.3	7.9	12.0	4.8	4.2	19.1	-
at 2002 prices	1,482	1,605	1,727	1,833	1,924	2,177	-
% change	7.0	8.3	7.6	6.1	5.0	13.1	-
Gross Domestic Product per capita (CFA Francs 000)							
at current prices	129.5	136.0	148.4	151.3	153.4	199.4	-
at 2002 prices	145.5	153.4	160.8	166.0	169.6	209.3	-
Population							
Millions	10.2	10.5	10.7	11.0	11.4	10.4	-
Consumer Price Index							
2002=100	89.0	88.7	92.3	91.2	90.5	95.3	100.0
%change	6.8	-0.4	4.0	-1.2	-0.7	-0.7	-0.7

Source: IFS, ZenithOptimedia

General economic situation

GDP total US\$6.818 billion; GDP per capita US\$17,045 (purchasing power parity; 2002). Consumer price index 102.4 (2002).

Performance of newspapers vs. other media

There are 12 national radio stations, 21 community stations and six television stations (two of them are only present on cable). All political parties own a radio station, while the two large parties also own a television station. Italian television and radio broadcast are also received. Italian TV channels are still very popular in Malta, with some 28% of Maltese saying they watched Italian channels at the beginning of 2001. Satellite TV is widely watched.

Performance of different types of newspapers

Malta has four daily newspapers, two written in Maltese and two in English; three Sunday papers in Maltese and three published in English; and two Maltese weeklies and two English ones. Many of Malta's newspapers and broadcast outlets have strong political affiliations.

Online/digital publishing

Almost all the broadcasting and print media are present on the web through their own sites.

Media/press laws

The 1991 Broadcasting Act permits private commercial broadcasting.

Source: CIA – The World Factbook 2003; Commonwealth Press Union

POPULATION & MORE FACTS

Population by age and sex

	All individuals		Male		Female	
	000	%	000	%	000	%
0-14	78	20	40	20	38	19
15-64	270	68	136	69	134	66
65+	52	13	22	11	30	15
Total	400	100	198	100	202	100

Source: CIA - The World Factbook 2003

	2003
Number of titles	
Total dailies	4
<i>National dailies</i>	4
Non-dailies	4
<i>National non-dailies</i>	4
Sundays	6
<i>National Sundays</i>	6

Source: WAN from public sources

Media consumption (minutes per day)

	2002
Newspapers	8
Radio	10
Television	77
Other	5

Source: The European Journalism Centre

Top dailies (2003)

Title	Publisher
L-Orizzont (The Horizon)	The General Workers Union
The Times	Allied Newspapers Ltd.
The Malta Independent	Standard Publications Ltd.
In-Nazzjon (The Nation)	The Partit Nazzjonalista

Source: The European Journalism Centre; WAN from public sources

MARSHALL ISLANDS

General economic situation

GDP total US\$115 billion; GDP per capita US\$2,017 (purchasing power parity; 2002). Consumer price index 102 (2002).

Performance of newspapers vs. other media

There are two radio stations: the state broadcaster and a station that offers religious broadcasting along with the news from the BBC and other foreign services. In addition, a cable station carries entertainment, foreign news and coverage of local

events. Some American TV channels are available via cable.

Performance of different types of newspapers

The private weekly newspaper *Marshall Islands Journal* is published in both English and the Marshallese language. The *Marshall Islands Gazette*, a government monthly, carries official news and announcements.

Sources: CIA – The World Factbook 2003; Freedom House; BBC News

POPULATION

Population by age and sex

	All individuals		Male		Female	
	000	%	000	%	000	%
0-14	22	39	11	38	11	39
15-64	33	58	17	59	16	57
65+	2	4	1	3	1	4
Total	57	100	29	100	28	100

Source: CIA 2003

	2002
Number of titles	
National non-dailies	2

Source: WAN from public sources

General economic situation

GDP total US\$4.891 billion; GDP per capita US\$1,679 (purchasing power parity; 2002). Consumer price index 103 (2002).

Performance of newspapers vs. other media

Radio is the most important medium to reach the public. The government continues to deny private applications to establish domestic radio stations. All broadcast media (radio and television) are government-owned and operated. Using satellite receivers and dish antennas, citizens can receive worldwide television broadcasts.

Performance of different types of newspapers

There are more than 300 journals and newspapers registered with the Ministry of the Interior, more than 200 of which do not publish regularly, including some that never have published an edition. There only are approximately 25 privately owned newspapers that publish on a regular basis. These journals are weeklies and reach limited audiences, printing at most 3,000 copies of any one edition. Two daily newspapers, *Horizons* and *Chaab*, are government-owned and operated. There is a private daily newspaper *Nouakchott info*. Anti-government tracts, newsletters, and petitions circulate widely in Nouakchott and other towns.

Newspaper launches/closures

In 2002, the authorities seized 11 issues of different journals and some newspapers were banned.

Media/Press Laws

The 1991 press law forbids the publication or dissemination of reports deemed to 'attack the principles of Islam or the credibility of the state, harm the general interest, or disturb public order and security.'

All newspapers must register with the Ministry of the Interior.

The government issues press cards to journalists and requires that they show this identification for participation in official press events.

The Press Law requires publishers to submit copies of newspapers to the Ministries of Interior and Justice before distributing them. The Ministry of the Interior reviews all newspaper copy prior to publication and usually authorizes sales and distribution within two to three days. However, the Press Law provides that the Minister of the Interior can stop publication of material that discredits Islam or threatens national security.

State support

Publications are exempt from all taxes on materials used to produce newspapers, journals, or books for the private press.

Sources: CIA - The World Factbook 2003; US State Department; BBC News

POPULATION & MORE FACTS

Population by age and sex

	All individuals		Male		Female	
	000	%	000	%	000	%
0-14	1,339	46	671	47	668	45
15-64	1,508	52	744	52	764	52
65+	66	2	27	2	39	3
Total	2,913	100	1,442	100	1,471	100

Source: CIA 2003

	2002
Number of titles	
Total dailies	3

Source: WAN from public sources

Top dailies (2002)

F = French A = Arabic

Title	Publisher
Horizons (F)	Government
Chaab (A)	Government
Nouakchott info	-

Source: WAN from public sources

MAURITIUS

General economic situation

GDP total US\$12.15 billion; GDP per capita US\$10,033 (purchasing power parity; 2002). Consumer price index 106.4 (2002).

Performance of newspapers vs. other media

In 2002, the government's monopoly in broadcasting local news and programming over the radio ended with the establishment of three independent radio stations. Foreign international news services, such as the United Kingdom's Sky News, France's Canal Plus, and Cable News Network were available to the public by subscription.

Performance of different types of newspapers

There are more than 20 newspapers published in the island.

The two main dailies are *Le Mauricien* and *L'Express*. There are a number of weeklies, the most important being *Week-End* (circulation 80,000) and *Le Defi-Plus* (50,000). *News on Sunday* is the only newspaper published completely in English. The other newspapers are written in French. The two main press groups are Le Mauricien Ltd. and La Sentinelle Ltd. Le Mauricien Ltd. publishes the daily *Le Mauricien* and the weeklies *Week-End*, *Week-End Scope* and *Turf Magazine*, which all are market leaders in their respective fields. La Sentinelle Ltd. publishes the daily *L'Express*.

Sources: CIA - The World Factbook 2003; US State Department; Australian Press Council

POPULATION & MORE FACTS

Population by age and sex

	All individuals		Male		Female	
	000	%	000	%	000	%
0-14	303	25	153	26	150	24
15-64	830	69	414	69	416	68
65+	78	6	31	5	47	8
Total	1,211	100	598	100	613	100

Source: CIA - The World Factbook 2003

Top dailies (2003)

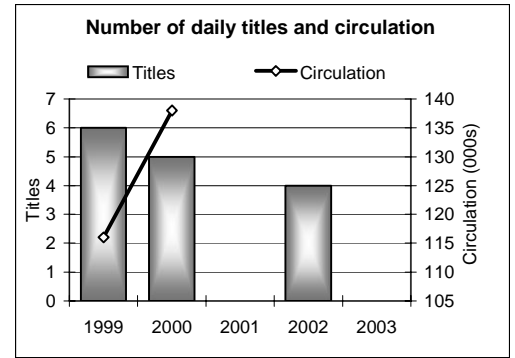
Title	Publisher	Circulation (000)
Le Mauricien	Le Mauricien Ltd.	35
L'Express	La Sentinelle Ltd.	25

Source: Australian Press Council



	1999	2000	2001	2002	2003	Change (%)	
						99/2003	2002/03
Number of titles							
Total dailies	6	5	-	4	-	-	-
Non-dailies	31	33	-	-	-	-	-
Circulation (000)							
Total dailies	116	138	-	-	-	-	-
Non-dailies	125	150	-	-	-	-	-

Source: UNESCO; BBC News



Due to a lack of available data, the majority of charts in this entry have not been updated since the 2003 edition of World Press Trends. Those that have not been updated clearly state the year to which the data relates.

Commentary - El Universal

The availability of public information on Mexican media is a constant problem. There are no official reports or private companies that report regularly on the media, only isolated efforts by some institutions and academics. With this in mind, we will elaborate on the crisis that hit the Mexican media hard in 2002, with resounding effects today.

The causes of this crisis lie in the contraction of the domestic market. This contraction was due to the recession in the US; high dependence on a single customer, the government; and the government's tendency to favour the electronic media.

The press has often seemed more interested in spreading government propaganda than discharging its social responsibility to readers. After the political upheaval in 2000, when Vicente Fox Quesada rose to power, it became obvious that many in the media were going to face life-or-death upheavals.

This first happened with one of the oldest newspapers in the country, *Excelsior*, when the Director was thrown out for trying to sell the paper behind the back of the cooperative that owned it. Since then, an internal dispute has ensued between two groups fighting the legal representatives of the Board of Directors. Recently, a notorious former police chief offered US\$150 million of uncertain origin to take over *Excelsior*.

Later, rival groups fought for control of the cooperative running the newspaper *El Día*. The struggle left the newspaper, once called "Spokesman for the People" by its founder, in a shambles.

Novedades stopped its presses for the last time on 31st December 2002, along with its English language paper, *The News*. Its assets were sold by its owner.

Neck high in problems, the owners of *El Heraldo* sold part of their shares to Telmex, owned by the entrepreneur Carlos Slim.

Unomásuno, once a groundbreaking independent newspaper, was turned into a pamphlet for the PRI party when it was in power. After the election turmoil, which ended in defeat for the PRI, the paper closed and its owner, a former PRI party official, sold it to a businessman who is now facing legal

action for abusing worker's rights, and a scandal over the ambiguous source of his fortune.

México Hoy closed its doors and its equipment and facilities were sold to property developers in Cancun.

These cases are but examples of the readjustment currently in progress in the Mexico City newspaper industry. The change of government and the old relationship between the media and the state has had the most profound consequences for Mexico City.

Mexico City, with 30 newspapers, must have one of the highest numbers of newspapers of any city in the world. This is where the crisis has hit hardest. Without government advertising, without an entrepreneurial drive and without readers (the highest print run by a Mexico City newspaper is lower than 200,000), the city papers face a tough future. This has led to job losses. Since early 2002 scores of journalists have been fired from newspapers and magazines (no precise number is available).

Journalists have also been subject to strong pressure from the government. That resulted in subpoenas to reporters from *El Universal* and *La Jornada*, to reveal their sources of information on corruption among politicians and officials.

Another problem for journalism is that Mexico has a loophole in its legal framework limiting the free exercise of journalism and the service it provides society. Reforms are needed to move defamation proceedings from criminal courts to civil courts. This is especially true when the plaintiff is a public official, and is already common practice in other parts of the world, including several nations in Latin America.

In June 2002 the Federal Act on Transparency and Public Access to Government Information was passed. The general objective of this law is to allow anyone access to information possessed by the government.

Also in 2002, the National Press Award Council was formed to choose and give the National Press Award, absolutely independently from the government. The Council is formed by journalists, civil associations and universities.

POPULATION

Population by age and sex (2002)

	All individuals		Male		Female		Households 000
	000	%	000	%	000	%	
0-15	24,219	23	11,930	23	12,289	23	22,269
16-24	13,559	13	6,679	13	6,880	13	
25-34	23,082	22	11,370	22	11,712	22	
35-44	23,184	22	11,419	22	11,765	22	
45-54	9,523	9	4,691	9	4,832	9	
55-64	9,833	10	4,843	10	4,990	10	
Total	103,400	100	50,932	100	52,468	100	

Source: INEGI, CIA

Age structure of readership (2002)

Age	% of readership	
	% of readership	% daily reach within age group
6-15	8.0	4.3
16-24	23.5	12.6
25-34	27.0	16.4
35-44	20.6	17.5
45-54	12.2	16.9
55-64	7.5	18.2
65+	1.2	21.7

Source: Ipsos Bimsa



Population by social class and sex (2002)

	All individuals		Male		Female	
	000	%	000	%	000	%
ABC+	14,786	14	7,283	14	7,503	14
C	16,025	15	7,894	15	8,131	15
D+	35,466	34	17,470	34	17,996	34
DE	37,121	36	18,285	36	18,836	36
Total	103,398	100	50,932	100	52,466	100

Source: INEGI, CIA

AB = High status

C+/C = Upper-middle/middle status

D+ = Lower-middle status

DE = Low status

Households (2001)

Occupancy	Individuals	
	000	%
1 person	1,784	2
2 people	6,472	7
3 people	15,042	15
4 people	24,419	25
5 or more people	49,755	51
without children	39,256	40
with children	58,227	60
with children aged 0-3	25,326	26
with children aged 4-9	36,332	37
with children aged 10-15	22,304	23
Total	97,483	100

Source: INEGI, Ipsos Bimsa

NUMBER OF TITLES AND CIRCULATION

	2001	2002	% Change 2001/02
Number of titles			
Total dailies	340	299	-12.06
National dailies*	13	2	-84.62
Local dailies	327	297	-9.17
Total non-dailies	-	11	-
Sundays	17	1	-94.12
Free papers	18	7	-61.11
Free dailies	2	-	-
Free non-dailies	16	-	-
Total annual sales (millions of copies)			
Dailies	-	553	-
Sundays	-	138	-

Source: Medios Publicitarios Mexicanos

Note: Figures include only those titles that are registered with Medios Publicitarios Mexicanos, however other titles do exist.

* There is currently a debate on the definition of 'national' newspapers - most of those included here are not distributed throughout the entire country.

MORE FACTS

Distribution and newsprint costs

	1998	1999	2000	2001	2002
As % of average cover price					
Single copy sales	-	-	-	25	25
Home deliveries	-	-	-	70	70
Average distribution cost per copy					
Subscription					
Local currency	-	-	-	5.0	2.0
Euros	-	-	-	0.55	2.14
Single copy					
Local currency	-	-	-	2.00-3.00	2.10
Euros	-	-	-	0.22-0.33	2.25
Newsprint costs (average per ton)					
Local currency	4,200	4,900	5,300	6,300	6,150
Euros	467	544	589	700	700

Source: Estimate provided by El Universal

Cover prices (2002)

	Peso
Single copy	2-10
Subscription	4-5

Online readership

Newspaper	2001	2002
Reforma	15,000,000	-
El Universal *	12,000,000	18,100,000

Source: Based on estimates

* El Universal is independently audited

Internet publishing (2001) (No. of online editions)

	2001
Dailies	340



Top ten dailies (2002)

Title	Publisher	Circulation (000)	Readership (000)	Cover Price		Format	Full page rate (Peso)	
				Peso	US\$		Mono	Colour
ESTO	Organización Editorial Mexicana	385	247	4.00	0.43	Tabloid	11,000	-
La Prensa	Organización Editorial Mexicana	330	443	4.00	0.43	Tabloid	17,500	-
El Universal	Compañía Periodística Nacional	182‡	420	4.00	0.43	Broadsheet	31,680	43,692
El Gráfico	Compañía Periodística Nacional	150‡	350	2.00	0.21	Tabloid	20,966	32,329
El Financiero	El Financiero SA de CV	147	75	7.00	0.75	Tabloid	136,000	217,600
Reforma	Consortio Interamericano de Comunicación	126	277	5.00	0.54	Broadsheet	198,720	171,504
El Norte	Editora El Sol de México, S.A. de C.V.	119	-	7.00	0.75	Broadsheet	-	-
La Jornada	Desarrollo de Medios, S.A. de C.V	101†	287	6.00	0.64	Tabloid	63,270	94,905
Diario de Yucatán	Compañía Tipográfica Yucateca, S.A. de C.V	60†	-	5.00	0.54	Broadsheet	29,680	-
El M	Compañía Periodística Nacional	50	170	free	-	Tabloid	-	-

Circulation: Figures are those listed in MPM (Printed Media) Directory, but these are not consistent with print runs or readership.

El Gráfico is listed in the MPM with a circulation of 18,000, which was its print run at the beginning of 2002. However, the paper was re-launched with a morning edition and ended 2002 circulating 150,000 copies a day.

‡ audited by IVM and CAC

† only certified by IVM

Readership source: BIMS A

Top ten advertising categories (2002)

Advertising sector	% of display ad revenue
Car dealers	8.0
Banks	5.5
Radio and telecoms	3.4
Schools	3.1
Computers	2.3
Entertainment centres	2.0
Airlines	1.8
Travel agencies	1.5
Warehouses	1.3
Hotels	1.2

Source: Estimate provided by El Universal

Top ten publishing companies (2002)

(ranked by total circulation)

Organización Editorial Mexicana
Compañía Periodística Nacional, S.A. de C.V.
Novedades Editores, S.A. de C.V.
Consortio Interamericano de Comunicación
Editorial El Sol de México, S.A. de C.V.
Desarrollo de Medios, S.A. de C.V
El Financiero, S.A. de C.V.
Unión Editorial, S.A. de C.V
Milenio Diario, S.A. de C.V.
Compañía Periodística Meridiano, S.A. de C.V.

Source: Estimate based on MPM (Printed Media Directory figures).

Top ten overall advertisers (2002)

Advertiser	Newspaper expenditure (US\$)
Ford	123,157,200
Nissan	100,947,840
National Council for Culture and Arts	86,449,696
Chevrolet	82,835,136
National Institute of Fine Arts	81,924,304
National Lottery	77,374,784
General Motors	67,732,864
Aeromexico	65,261,600
National Autonomous University of Mexico	62,124,496
Mexicana Airlines	60,702,336

Source: IBOPE/AGB

Newspaper colour capability & formats

Number of:	1998	1999	2000	2001	2002
4-colour newspapers	40	42	45	50	45
Broadsheets	156	162	180	180	-
Tabloids	104	108	120	120	-

ADVERTISING EXPENDITURE & ECONOMIC DATA

Main economic indicators 1996-2002

	1996	1997	1998	1999	2000	2001	2002
1 US\$=	9.34	Pesos at 2002 rate					
Gross Domestic Product (Pesos billion)							
at current prices	2,530	3,179	3,848	4,599	5,491	5,772	6,153
% change	37.5	25.7	21.1	19.5	19.4	5.1	6.6
at 2002 prices	4,802	5,003	5,224	5,355	5,839	5,772	6,153
% change	2.3	4.2	4.4	2.5	9.0	-1.1	6.6
Gross Domestic Product per capita (Pesos 000)							
at current prices	27.0	33.4	39.8	46.9	54.8	56.7	60.5
at 2002 prices	51.3	52.6	54.1	54.6	58.2	56.7	60.5
Population							
Millions	93.6	95.1	96.7	98.1	100.3	101.8	101.8
Consumer Price Index							
2002=100	52.7	63.5	73.7	85.9	94.0	100.0	100.0
% change	34.4	20.6	15.9	16.6	9.5	6.3	5.1
Ad.spend as a % of GDP							
	0.53	0.63	0.63	0.61	0.59	0.58	0.54
Advertising Expenditure Growth (%)							
at current prices	54.2	50.0	21.7	16.2	15.5	2.0	0.0
at 2002 prices	14.8	24.4	5.0	-0.4	5.4	-4.1	-4.8

Source: IFS, ZenithOptimedia



Advertising expenditure

(Peso millions, in current prices)

	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
Newspapers	2,527	3,469	4,188	5,022	5,115	5,199	5,120	5,169	5,367	5,582	4,207
Magazines	1,876	2,772	3,287	3,531	3,707	3,823	2,999	3,058	3,147	3,300	2,430
Television	6,188	10,469	13,332	15,243	18,779	19,634	20,024				
Radio	2,727	3,271	3,511	4,452	5,011	4,611	4,799				
Total	13,318	19,980	24,318	28,248	32,612	33,267	31,922	36,974	43,766	49,338	35,150

Source: 1996-2001 IBOPE adjusted by ZenithOptimedia, 2002-2006 ZenithOptimedia

Notes: The average effect of ZenithOptimedia's adjustments is to reduce reported gross figures by about 66%.

Figures exclude agency commission at 15%, excludes production costs, includes classified.

Research

Circulation is audited by: IVM (Media Verifying Institute), CAC (Certified Audit of Circulation, only audits *El Universal*)

Readership is measured by: Ipsos Bimsa, Arbitron, Gallup, Nielsen

Methodology (BIMSA): Survey conducted through face-to-face interviews with 7,500 people each quarter.

Taxes

VAT on: sales 0 advertising 15%
 newsprint 0% plant 15%
 outside composition 15%
 standard VAT rate 15%

Daily newspapers are tax exempt, however they have to pay 35% tax on profits just as other companies do. Advertising is taxed at 15%, as is bill posting.

Subsidies

No subsidies are available.

Discounts

on: post 0 rail 0 telephone 0 telegraph 0 telex 0

Are there any restrictions on ownership of publishing houses, or the registration of shares in newspaper publishing companies? No. There is legislation that regulates radio and TV in this way, but not printed media.

Is there any law prohibiting or restricting foreign companies or individuals from owning shares or majority stakes in domestic daily newspapers? Yes. No foreign individual or company can be the major shareholder of a domestic daily or non-daily newspaper.

Is there any law prohibiting daily newspaper or periodical publishers from operating radio or television stations in the same locality? No

So as to guarantee disclosure and transparency in the capital structure and to avert silent partnerships, is there a law or rule making it possible to determine who actually owns a publishing company? No

Is there an antitrust law limiting concentration in the daily press? There are limits for broadcasters, but not for printed media.

Is further regulation of media concentration expected? No

General economic situation

GDP total US\$277 million; GDP per capita US\$2,565 (purchasing power parity; 2002). Consumer price index 101 (2002).

Performance of newspapers vs. other media

Each of the four state governments controls a radio station that broadcasts primarily in the local language. Religious groups operate private radio stations. There are television stations in three of the four states. The populations of the states of Pohnpei, Chuuk, and Kosrae have access to live satellite-broadcast information from around the world and tape-delayed broadcasts of programming by the major U.S. networks.

Performance of different types of newspapers

There are no daily newspapers. There is an independent weekly called *The Island Tribune*. The Yap state has a privately published weekly newspaper, the *Yap Networker*. A biweekly newspaper – the *Kaselehlie Press* (originally known as the *Rohng En Pohnpei*) – commenced publication in 2000. The federal government publishes a fortnightly information bulletin, the *National Union*, and each of the constituent state governments produces its own newsletter.

Sources: CIA – *The World Factbook 2003*; US State Department; BBC News

POPULATION

Population by age and sex

	All individuals		Male		Female	
	000	%	000	%	000	%
0-14	41	38	21	38	20	38
15-64	63	58	32	58	31	58
65+	4	4	2	4	2	4
Total	108	100	55	100	53	100

Source: CIA - *The World Factbook 2003*

Due to a lack of available data, the majority of charts in this entry have not been updated since the 2002 edition of World Press Trends. Those that have not been updated clearly state the year to which the data relates.

Commentary – Association de la Presse Independente de la Moldovie

There are three types of newspaper in Moldova: those owned by the state, those owned by political parties, and independent private newspapers. State-owned newspapers are funded as part of the national budget and publish only state-approved information.

Newspapers face three main problems in Moldova. First, many

people are not interested in reading newspapers, and would not be able to afford to buy one even if they were. Second, much of Moldova's economy is dependent on the black market, and black market operators cannot advertise. Third, the state imposes financial, administrative and legal obstacles to the development of a democratic press, such as the amendment to the Press Law that limits newspapers' access to foreign capital.

POPULATION

Population by age and sex

	All individuals		Male		Female	
	000	%	000	%	000	%
Children	828	23	423	24	405	21
16-24	662	18	335	19	327	17
25-34	492	14	244	14	248	13
35-44	555	15	265	15	290	15
45-54	464	13	218	13	246	13
55-64	287	8	124	7	163	9
65+	343	9	129	7	214	11
Total	3,631	100	1,738	100	1,893	100

Source: Census 1989

NUMBER OF TITLES AND CIRCULATION

	2002
Number of titles	
National dailies	3
Non-dailies	108
<i>National non-dailies</i>	78
<i>Regional non-dailies</i>	19
<i>Local non-dailies</i>	11
Free papers	2
Circulation (000)	
National dailies	60
Non-dailies	595
<i>National non-dailies</i>	481
<i>Regional non-dailies</i>	92
<i>Local non-dailies</i>	22
Free papers	2
Total annual sales (millions of copies)	
Dailies	6.3
Non-dailies	30.9
Free papers	0.1

Source: Association de la Presse Independente de la Moldovie

MORE FACTS

Contribution of classified, display and insert advertising to total advertising income (%)

	2002
Display	90
Classified	9
Inserts	1

Newsprint costs

	2002
Newsprint costs (average per ton)	
Lei	9,000
Euro	600

Top ten non-dailies (2002)

Title	Publisher	Circulation	Readership	Cover Price		Format	Full page rate	
				Lei	US\$		Mono	Colour
Komsomolskaya Pravda	IMKP Basarabia	51,190	153,170	2.50	0.18	A3	US\$0.40	-
Makler	-	50,000	150,000	3.00	0.21	A3	6.45 lei	-
Flux	GP Flux	39,700	99,250	2.00	0.14	Tabloid	US\$0.42	US1.00
Komunist	Partie Comuniste	26,000	78,000	1.00	0.07	A3	-	-
Timpul	Timpul info Magazin	20,000	60,000	2.00	0.14	A3	US\$0.42	US\$0.60
Saptamina	SRL Saptamina	17,345	34,690	2.50	0.18	A3	4.5 lei	-
Spros I predlozhenie	SRL Cerere si Oferta	16,900	67,600	3.00	0.21	A3	1.25 lei	3 lei
Sport Curier	SA Sport Curier	18,000	36,000	2.00	0.14	A4	3 lei	-
Trud Moldova	-	15,600	62,400	2.50	0.18	A3	US\$0.45	-
Tainele Sanatatii	SA Tainele Sanatatii	15,000	60,000	2.00	0.14	A3	6 lei	-

Top advertisers (2002)

Advertiser	Newspaper expenditure US\$
Moldova Agroindbank	150,000
Voxtel	100,000
Banca de Economii	75,000
QBE ASITO	75,000
Bursa LARA	40,000
Moldcell	40,000
Petrom	30,000

Source: Association de la Presse Independente de la Moldovie

Top advertising categories (2002)

Advertising sector	% of display ad revenue
Banks	35
Insurance	25
Telecommunications	25
Auto	15

Source: Association de la Presse Independente de la Moldovie

**Online readership** (visits per day)

Newspaper	2002
Komsomolskaya Pravda	450
Nezavisimaia Moldova	350
Logos Press	300
Timpul	200
Moldavskie Vedomosti	200

Source: *www.super.md***Cover prices**

	Lei
Single copy	1.50
Subscription (6 months)	200.00

Daily newspaper formats

Number of:	2002
Broadsheets	3
Tabloids	0
Other	0

Internet publishing (No. of online editions)

	2002
Dailies	3
Non-dailies	40

Employment & salary

	2002
Total no. of Journalists	452
Total no. of Employees	1,124
Total salary costs	
<i>Lei (000)</i>	1,400
<i>Euro (000)</i>	100

Research

Circulation is audited by: Selemenut, a state-owned monopoly.

Taxes

VAT on:	sales 0	advertising 20%
	newsprint 0	plant 0
	composition 0	(standard VAT rate 20%)

Media companies face a 22% tax on profits, like other private companies.

Discounts

on:	post and other transport 0	rail 0
	telephone 0	telegraph 0
	fax 0	

Subsidies

	2002
Lei (000)	20,000
Euro (000)	12,903

Ownership

Does any law exist governing publishing-house ownership, or the

registration of shares in newspaper-publishing companies? No

Is there any law prohibiting or restricting foreign companies or individuals from owning shares, and in particular, the majority of shares, of domestic daily newspapers? Article 12 of the Press Law allows newspapers to accept donations from abroad, but forbids them to accept any other form of funding from foreign governments, except from countries with which Moldova has reached a bilateral agreement. Foreign natural persons and legal entities can own no more than 49% of the capital of a periodical or press agency.

Is there any law prohibiting daily newspaper or periodical publishers from operating radio or television stations in the same locality? No

So as to guarantee disclosure and transparency in the capital structure and to avert silent partnerships, is there a law or rule making it possible to determine who actually owns a publishing company? No

Is there an antitrust law limiting concentration in the daily press? No

Are there plans to pass legislation regulating media concentration? No

General economic situation

GDP total US\$870 million; GDP per capita US\$27,187 (purchasing power parity; 1999). Consumer price index not available.

Performance of newspapers vs. other media

There is one private television station. Foreign radio and television are easily received. The influence of Monaco's broadcast media extends far beyond the borders of the tiny state. From the 1960 Radio Monte-Carlo used powerful transmitters to reach listeners across much of France, and in the 1970s broadcasts to Italy began. Radio Monte-Carlo now has extensive FM networks in both countries. Radio Monte-Carlo Money Orient, a service for the Arab world set up in 1972, is now operated by Radio France Internationale.

Performance of different types of newspapers

Monaco has no domestically published daily newspaper. The government produces the weekly news bulletin *Journal de Monaco*. Foreign newspapers and magazines circulate freely, including French journals that specifically cover news in the Principality.

Media/press laws

Television and radio stations that broadcast from the Principality operate in accordance with French and Italian regulations.

The Penal Code prohibits public denunciations of the ruling family, a provision that the media generally respect in practice.

Sources: CIA – *The World Factbook 2003*; Freedom House; US State Department; BBC News

POPULATION**Population by age and sex**

	All individuals		Male		Female	
	000	%	000	%	000	%
0-14	5	16	3	19	2	13
15-64	20	63	10	63	10	63
65+	7	22	3	19	4	25
Total	32	100	16	100	16	100

Source: CIA – *The World Factbook 2003*

Commentary – Press Institute of Mongolia

Consolidation of local newspapers published in the countryside began in 2002 and continued in 2003. Egel, a company that initially ran one provincial newspaper called *Shine medee*, bought three provincial newspapers in 2002. In 2003 it bought another five, becoming the owner of a total of nine provincial newspapers.

Until 2002 the state-owned company Mongol shuudan dominated the newspaper distribution market, though several other small distribution companies have been operating since 1990. Since 2003, however, the market share of Mongol Shuudan has declined; an independent distribution company called Ulaanbaatar shuudan increased its share of the distribution market from about 3% to 43% in 2003.

POPULATION

Population by age and sex

	All individuals		Male		Female		Households 000
	000	%	000	%	000	%	
0-15	808	33	403	33	405	32	541
16-24	553	22	280	23	273	22	
25-34	425	17	211	17	214	17	
35-44	327	13	161	13	165	13	
45-54	169	7	84	7	86	7	
55-64	107	4	51	4	56	4	
65+	87	4	38	3	50	4	
Total	2,475	100	1,228	100	1,247	100	

Source: National Statistical Office of Mongolia. Ulaanbaatar 2002

Households

Occupancy	Households 000	%
1 person	35.2	7
2 people	154.2	29
3 people	219.7	41
4 people	97.9	18
5 or more people	33.6	6
Total	541	100

Source: National Statistical Office of Mongolia. Ulaanbaatar 2001

Age structure of readership

Age	% of readership
Under 16	7.9
16-24	22.8
25-34	24.2
35-44	19.1
45-54	12.3
55-64	9.0
65+	4.7

Source: Audience research in Ulaanbaatar, Mongolia, 2003

Newspaper reach (%)

	Daily
All adults	55.4
Men	40.4
Women	59.6

Source: Audience research in Ulaanbaatar, Mongolia, 2003

NUMBER OF TITLES AND CIRCULATION

	1999	2000	2001	2002	2003	Change (%)	
						99/2003	2002/03
Number of titles							
Total dailies	5	5	5	5	6	20.00	20.00
National dailies	5	5	5	5	5	0.00	0.00
Regional & local dailies	0	0	0	0	1	-	-
Non-dailies	12	6	4	5	3	-75.00	-40.00
National non-dailies	7	1	0	0	0	-100.00	-
Regional & local non-dailies	5	5	4	5	3	-40.00	-40.00
Weeklies *	6	28	35	28	24	300.00	-14.29
Free papers	212	-	-	-	-	-	-
Fortnightlies **	-	54	65	66	65	-	-1.52
Monthlies	-	37	40	47	39	-	-17.02
Less than monthly	-	33	31	28	27	-	-3.57
Circulation (000) ^							
Total dailies	40	44	39	42	38	-5.00	-9.52
National dailies	40	44	39	42	35	-12.50	-16.67
Regional & local dailies	0	0	0	0	3	-	0.00
Non-dailies	29	4	5	4	12	-58.76	179.07
National non-dailies	22	1	-	-	-	-	-
Regional & local non-dailies	7	3	5	4	12	71.43	179.07
Weeklies *	32	120	133	217	120	275.00	-44.70
Fortnightlies **	-	74	157	188	164	-	-12.77
Monthlies	-	52	79	97	74	-	-23.71
Less than monthly	-	26	15	18	32	-	77.78
Total annual sales (thousands of copies)							
Dailies	11,128	12,915	11,480	10,752	11,449	2.88	6.48
National dailies	-	-	-	-	10,768	-	-
Regional & local dailies	-	-	-	-	681	-	-
Non-dailies	2,535	177	499	804	1,211	-52.23	50.62
Weeklies *	1,666	5,624	6,105	5,612	5,450	227.13	-2.89
Free papers	9,269	-	-	-	-	-	-
Fortnightlies **	-	2,051	3,954	4,802	4,838	-	0.75
Monthlies	-	385	556	645	481	-	-25.42
Less than monthly	-	122	74	58	187	-	222.41

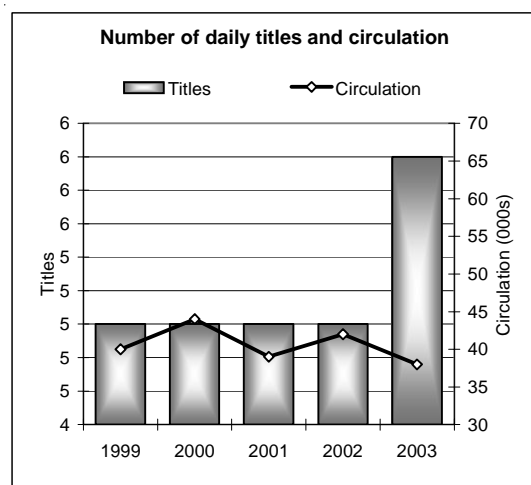
Note: The method for categorising newspapers was changed for 2000, making all but dailies incomparable to previous years.

Excludes newspapers that publish only once or twice a year, or stopped appearing after 1-2 issues.

^ Not all newspapers' circulations are monitored, although all those for dailies and weeklies are.

* prior to 2000, refers to 'Saturdays' ** Published 2-3 times a month

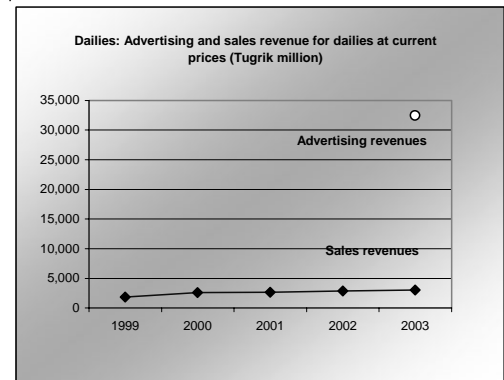
Figures for free papers were unavailable for 2000 or 2001, although many of the fortnightly, monthly and less than monthly papers are free.





MORE FACTS

	1999	2000	2001	2002	2003	Change (%)	
						99/2003	2002/03
Advertising revenues (Tugrik million)							
Dailies	-	-	-	-	32,424	-	-
National dailies	-	-	-	-	31,638	-	-
Regional & local dailies	-	-	-	-	786	-	-
Sales revenues (Tugrik million)							
Dailies	1,813	2,583	2,640	2,866	3,053	68.39	6.52
Non-dailies	445	44	125	124	299	-32.81	140.93
Weeklies *	210	1,406	2,014	1,475	-	-	-
Fortnightlies **	-	615	1,106	1,271	-	-	-
Monthlies	-	96	145	179	-	-	-
Less than monthly	-	31	17	9	-	-	-

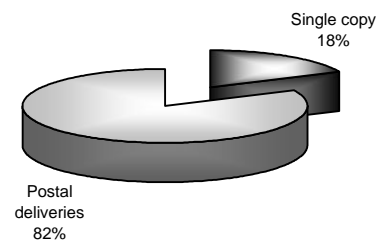


Note: The method for categorising newspapers was changed for 2000, making all but dailies incomparable to previous years.
 Excludes newspapers that publish only once or twice a year, or stopped appearing after 1 or 2 issues.
 * figures prior to 2000 refer to 'Saturdays'
 ** Published 2-3 times a month
 Figures for free papers were unavailable from 2000, although many of the fortnightly, monthly and less than monthly papers are free.
 Figures include VAT

Type of newspaper sales (%)

	Single copy	Postal deliveries	Other
1999	53.0	47.0	-
2000	18.0	81.1	0.9
2001	9.2	90.8	-
2002	18.4	81.6	-
2003	18	82	-

Type of newspaper sales in 2003 (%)



Contribution of classified and display advertising to total advertising income (%)

	1999	2000	2001	2002	2003
Display	60	-	55	45	51
Classified	40	-	45	55	49

Top dailies (2003)

Title	Publisher	Circulation	Cover Price		Format	Full page rate (Tugrik)
			Tugrik	US\$		Mono
Udriin sonin	Udriin medee Co.Ltd	9,625	300	0.27	Broadsheet	300,000
Zuunii medee	ZM Co.Ltd	9,075	300	0.27	Broadsheet	250,000
Unen	MPRP	7,400	200	0.18	Broadsheet	200,000
Unoodor	Mongol News Co.Ltd	6,700	350	0.32	Broadsheet	300,000
Mongolyn medee	Erel Co.Ltd	3,243	200	0.18	Broadsheet	225,000
Ulaanbaatar times	UB government authority	3,243	250	0.23	Broadsheet	100,000

Top ten advertising categories (dailies - 2003)

Advertising sector	% of display ad revenue
Loans	14.3
Banks/finance/savings/credit cards	7.0
Electronics/household goods	6.9
Sales	6.5
Apartments	6.4
Food	6.2
New products and services	5.7
Construction	4.2
Auto	3.7
Vodka/pubs/beverages/water	3.1

Source: Press Institute of Mongolia

Top ten advertisers (dailies - 2003)

Advertiser	Newspaper expenditure Tugrik (000)
Nomin Holding	38,638
Trade Development Bank	26,663
Apu Co. Ltd	14,948
Mongolian Civil Air Transport Company	12,090
Saving Bank	11,757
Agricultural Bank Of Mongolia	9,939
Mobicom Corporation	9,622
Jiguur Grand Co. Ltd	9,558
Anod Bank	9,491
Housing Group	7,720

Source: Press Institute of Mongolia

Cover prices

	Tugrik
Single copy	266
Subscription (per issue)	97



Top ten publishing companies (2003)

ranked by circulation	Total sales (000)	Total revenue Tugrik (000)
Udriin medee Co. Ltd	3,043	912,714
Zuunii medee Co. Ltd	2,831	849,420
Mongol News Co. Ltd	2,334	700,260
Mongolian People's Revolutionary Party	1,894	378,820
Tayankhan Co. Ltd	1,721	516,250
Khumuus Co. Ltd	1,384	415,087
Erel Co. Ltd	964	192,824
Shirevger Co. Ltd	811	202,800
Suragch private newspaper	540	108,000
Erkhet Mongol Co. Ltd	528	158,368

Source: Press Institute of Mongolia

Distribution and newsprint costs

	1999	2000	2001	2002
As % of average cover price				
Single copy sales	20	20	20	53
Postal deliveries (Ulaanbaatar)	12	12	12	47
Postal deliveries (Provinces)	20	20	20	
Newsprint costs (average per ton)				
Tugrik (000)	-	-	935	360

Internet publishing (No. of online editions)

	1999	2000	2001	2002	2003
Dailies	3	3	5	5	1
Non-dailies	-	-	-	-	1
Weeklies	-	-	13	8	3

Online readership (page impressions per month)

Newspaper	2003	
Biz Mongolia	www.bizmongolia.mn	680
IWAM News letter	www.ulaanbaatar-net/iwam/newsletter.shtml	-
Mongolia Today	www.mongoliatoday.com	86
Minii Mongol	www.mymongol.com	-
Tsag uye	www.newtimes.mn	-

Employment & salary

	2003
Total no. of journalists	428
Total no. of employees	931
Total salary costs	
	Tugrik (000) 780,612
	US\$ 703

Newspaper colour capability & formats

	2003
4-colour newspapers	61%
Broadsheets	51%
Tabloids	39%
Other	10%

Research

Circulation is audited by: The Press Institute of Mongolia. The national NGO, established in 1996, has been monitoring the media development trends since 1999. The research includes number of media outlets, circulation, ownership, media employees, their salary, educational level etc.

Methodology: Circulation figures are based on declarations from publishers, and verified with data from printing houses and distribution companies. Not all media outlets participate in the monitoring process, but the number that do has been steadily increasing.

Readership is measured by: The Press Institute of Mongolia established systematic readership and audience research in Ulaanbaatar in September 2003. The research includes analysis of broadcast and programme ratings, the most convenient and most common hours for viewers to watch television, newspaper readership, media consumption in Ulaanbaatar, etc.

Methodology: Sample size: 500 households in Ulaanbaatar selected by quota from six districts. Data collected by combined diary and interview system.

Taxes

VAT on: sales 0 advertising 0 newsprint 0
plant 0 composition 0 (standard VAT rate 0)

Like all other companies, newspapers pay a 15% tax on all profits up to 100 million Tugrik, and 40% on all profits above this level. There are certain tax discounts for newspapers owned by NGOs (non-governmental organisations).

Subsidies

No newspapers receive subsidies.

Discounts

on: post 0 rail 0 telephone 0 telegraph 0 telex 0

Ownership

Does any law exist governing publishing-house ownership, or the registration of shares in newspaper-publishing companies? The 1998 Press Freedom Law prohibited government-owned newspapers. No other regulations exist.

Is there any law prohibiting or restricting foreign companies or individuals from owning shares, and in particular, the majority of shares, of domestic daily newspapers? No

Is there any law prohibiting daily newspaper or periodical publishers from operating radio or television stations in the same locality? No

So as to guarantee disclosure and transparency in the capital structure and to avert silent partnerships, is there a law or rule making it possible to determine who actually owns a publishing company? No

Is there an antitrust law limiting concentration in the daily press? No

Is further regulation of media concentration expected? No

ADVERTISING EXPENDITURE & ECONOMIC DATA

Main economic indicators 1994-2001

	1994	1995	1996	1997	1998	1999	2000	2001
1 US\$ = 1,110.31 Tugrik at 2002 rate								
Gross Domestic Product (Tugrik billion)								
at current prices	283.3	550.3	646.6	832.6	817.4	873.7	-	-
% change	70.4	94.3	17.5	28.8	-1.8	6.9	-	-
at 2001 prices	1,262.7	1,564.9	1,251.7	1,180.5	1,059.6	1,052.9	-	-
% change	-9.2	23.9	-20.0	-5.7	-10.2	-0.6	-	-
Gross Domestic Product per capita (Tugrik 000)								
at current prices	124.8	239.2	281.1	362.0	350.8	370.2	-	-
at 2001 prices	556.3	680.4	544.2	513.2	454.7	446.1	-	-
Population								
Millions	2.3	2.3	2.3	2.3	2.3	2.4	2.4	2.4
Consumer Price Index								
2001=100	22.4	35.2	51.7	70.5	77.1	83.0	92.6	100.0
% change	87.6	56.7	46.9	36.6	9.4	7.6	11.6	8.0
Ad.spend as a % of GDP								
	-	-	-	0.09	0.12	-	-	-

Source: IFS, ZenithOptimedia

General economic situation

GDP total US\$121.8 billion; GDP per capita US\$3,844 (purchasing power parity; 2002). Consumer price index 103.6 (2002).

Performance of newspapers vs. other media

The government owns Moroccan Radio-Television (RTM). Another major broadcaster is the French-backed Medi-1, which operates from Tangier. A government-appointed committee monitors broadcasts. The government owns the only television stations whose broadcasts can be received in most parts of the nation without decoders or satellite dish antennas. Dish antennas are in wide use throughout the country. The government did not impede the reception of foreign broadcasts in 2002.

Performance of different types of newspapers

In 2002 there were approximately 2,000 domestic and foreign newspapers, magazines, and journals in circulation. The number of Moroccan print titles increased from 473 in 1993 to 641 in 2003. A specialized press including 460 titles exceeds the general press represented by 181 titles. More than 70% of the titles are owned by private individuals, 14% by companies, 6.8% by associations and 6% by political parties. The government owns the official press agency Maghreb Arab Press (MAP), and the Arabic daily newspaper *Al-Anbaa*. The government also supports two semi-official dailies: the French-language *Le Matin* and the Arabic-language *Assahra Al Maghribia*. There are a dozen national daily newspapers.

Circulation

In 2003, the Minister of Communication informed about its intention to set up an audit bureau of circulations.

Readership

The number of readers has been stagnating for several years.

Ownership

The government plans to allow private investment in state-run broadcasters and the official news agency.

Media/press laws

The law permits prison sentences and financial penalties for journalists and publishers who violate its restrictions on defamation, libel and discussion regarding three topics: the monarchy; territorial integrity; and Islam. The Press Code lists threats to "public order" as one of the criteria for the censor to consider.

Government control of the media generally is exercised through directives and "guidance" from the Ministry of Interior. Publications that are judged offensive can be confiscated or indefinitely suspended. The government may censor newspapers directly by ordering them not to report on specific items or events. The government registers and licenses domestic newspapers and journals and can use the licensing process to prevent the publication of materials that exceed its threshold of tolerable dissent. The Ministry of Interior can control foreign publications by removing "banned" publications from circulation.

In 2002, the government passed a new Press Code; however, its substantive changes from the 1958 Code were minimal. The new law requires the Ministry of the Interior to justify to the courts any seizure or banning of domestic or foreign publications, suspension of the publisher's licence, or destruction of equipment. The law continues to provide for jail sentences (3 to 5 years, rather than the 5 to 20 of the 1958 law), fines, and payment of damages for newspaper officials found guilty of libelling public officials.

State support

The government subsidizes the press through price controls for newsprint and office space.

A number of organisations exist to protect the rights of media workers throughout the country and to influence media law and policy. The main one is the National Union of the Moroccan Press (SNPM) which was set up in 1963. It receives an annual state subsidy of about 200,000 DH (US\$19,000).

Sources: CIA - *The World Factbook 2003*; US State Department; BBC News; Stanhope Centre UK; *Correspondance de la Presse*

POPULATION

Population by age and sex

	All individuals		Male		Female	
	000	%	000	%	000	%
0-14	10,523	33	5,361	34	5,162	32
15-64	19,643	62	9,766	62	9,877	62
65+	1,523	5	676	4	847	5
Total	31,689	100	15,803	100	15,886	100

Source: CIA - *The World Factbook 2003*

Top dailies (2003)

Title	Publisher (Language)
Al-Anbaa	Government (in Arabic)
Le Matin	(in French)
Assahra Al Maghribia	(in Arabic)
L'Opinion	Societe Arrissala (in French)
Liberation	(in French)

Source: WAN from public sources

NUMBER OF TITLES AND CIRCULATION

						Change (%)	
	1999	2000	2001	2002	2003	99/2003	2002/03
Number of titles							
Total dailies	22	23	-	-	132	500.00	-
Non-dailies	581	507	-	-	509	-12.39	-
Circulation (000)							
Total dailies	728	846	-	-	350	-51.92	-
Non-dailies	3,724	4,108	-	-	-	-	-

Source: UNESCO; Ministry of Communication, Morocco

General economic situation

GDP total US\$19.52 billion; GDP per capita US\$1,117 (purchasing power parity; 2002). Consumer price index 115.2 (2002).

Performance of newspapers vs. other media

While the government no longer owns most radio and television stations, government stations were the only broadcasters capable of countrywide transmission in 2002; however, there were local and independent broadcasts in most urban areas. Radio Mozambique, the public's most important source of information, was government-owned; however, its news coverage was generally considered unbiased and fair. It broadcast in Portuguese and 18 indigenous languages; its external service broadcast in English as well as in Portuguese for citizens in neighbouring South Africa. Radio Mozambique regularly broadcast public debates that included a variety of participants with differing opinions.

In addition to Radio Mozambique, there were 14 community-based (supported by UNESCO and the government), four religious, and 11 commercial private radio stations, most of which used local languages in addition to Portuguese and which cover most of the country. One station – Radio Terra Verde (RTV) – was linked directly to the Mozambique National Resistance (RENAMO). RTV was second only to Radio Mozambique's youth-oriented Radio Cidade in popularity, outside of broadcast times for soccer matches. Foreign radio programmes – including the British Broadcasting Corporation (BBC), Radio France International (RFI), Radio Diffusao Portugal (RDP) Africa, and the Voice of America (VOA) – reached all major population centres and reported local news via Mozambique-based part-time reporters; the BBC and the RFI carried news in Portuguese but broadcast most of the day in English and French, respectively.

Performance of different types of newspapers

Diario de Mocambique – published in Beira – and *Noticias* – published in Maputo – were the only daily newspapers. *Diario de Mocambique* is owned by the Commercial News Society of Beira, in which FRELIMO officials owned majority shares. Operating from the central province of Sofala, *Diario de Mocambique* is the only mainstream newspaper produced outside Maputo. FRELIMO officials also owned *Noticias*, the largest and oldest daily in Mozambique.

In 2002, there were four independent weekly newspapers published in Maputo, and six other independent weekly journals published in provincial capitals. According to the Panos Institute, the 10 weekly newspapers had a combined total circulation of 50,910. There were an additional 20 periodicals with a combined circulation of approximately 34,000. The second oldest faxed daily – *Imparcial* – was owned by RENAMO. Only a small minority of the population received news directly through the print media.

Media ownership is diverse. The U.N. Educational, Scientific, and Cultural Organization (UNESCO) Media Project estimated that in 2002, 34% of the country's media were public (government-controlled), 36% were private commercial, and 28% were private nonprofit (church-affiliated); however, the public category included the country's only daily newspapers, the only Sunday newspaper, and the only weekly news magazine. Two pro-government newspapers – *Noticias* and *Domingo* – together with a third sports-oriented weekly were owned by a single corporation – *Noticias Limited* – in which state-owned enterprises and FRELIMO members hold majority shares.

Online/digital publishing

Several independent media have websites. In 2002, there were six periodicals that transmitted daily editions electronically, with a combined subscription of more than 1,500.

Ownership

In 2002, UNESCO expressed concern about the strong concentration of national and local media in Maputo city and province, mirroring lopsided socioeconomic development nationwide.

State support

In 2002, Radio Mozambique received the largest single subsidy from the state budget of any public media company.

Media associations

The Syndicate Nacional de Journalists (SNJ) is the largest media organisation in the country with a membership of nearly 1,000, three quarters of whom are journalists.

Source: CIA – *The World Factbook 2003*; US State Department; *Media Institute of Southern Africa*

POPULATION & MORE FACTS

Population by age and sex

	All individuals		Male		Female	
	000	%	000	%	000	%
0-14	7,359	42	3,634	43	3,725	42
15-64	9,658	55	4,713	55	4,945	55
65+	462	3	190	2	272	3
Total	17,479	100	8,537	100	8,942	100

Source: CIA – *The World Factbook 2003*

Top dailies (2002)

Title	Publisher
Diario de Mocambique	The Commercial News Society of Beira
Noticias	Sociedade Noticias

Source: WAN from public sources

	2003
Number of titles	
Total dailies	2

Source: WAN from public sources

POPULATION & MORE FACTS

Population by age and sex

	All individuals		Male		Female		Households 000
	000	%	000	%	000	%	
Children	17,690	35	8,978	35	8,712	34	10,300
16-24	8,448	17	4,323	17	4,125	16	
25-34	8,220	16	4,091	16	4,129	16	
35-44	6,489	13	3,170	12	3,319	13	
45-54	4,549	9	2,203	9	2,346	9	
55-64	3,024	6	1,433	6	1,591	6	
65+	2,718	5	1,223	5	1,495	6	
Total	51,138	100	25,421	100	25,717	100	

Source: Statistical Yearbook 2001

Newspaper reach (%)

	Daily
All adults	7
Adults (Greater Yangon)	38

Source: MMRD

Population by social class and sex

	All adults		Male		Female	
	000	%	000	%	000	%
AB	1,152	4	760	5	392	3
C1	2,299	8	1,404	9	895	6
C2	3,867	13	1,630	11	2,237	15
D	6,567	22	4,896	33	1,671	11
E	16,366	54	6,209	42	10,157	66
Total	30,251	100	14,899	100	15,352	100

Source: MMRD 2000

AB=company owners, professionals, top/middle management

C1=sales/service workers, clerical workers, skilled/unskilled labour

C2=family business workers

D=farmers

E=subsistence/inactive

MORE FACTS

Top dailies (2001)

Title	Circulation (000)	Full page rate (US\$)	
		Mono	
Myanma Alin	200	2,800	
Kyaemon	190	2,800	
New Light of Myanmar	24	4,400	
Yadanarbon	22	120	
Mandalay Daily	15	120	
Myodaw	10	133	

Source: MMRD/Ratecard 2000

Top ten advertisers (2001)

Advertiser	Newspaper expenditure Kyat (mill)
Dragon Oil Lubricant	58.0
Nutroplex Multivitamins	19.9
Daily Vitagin Ginseng Vitamins	18.7
Enervon-C Anti-Stress Vitamins	18.0
Obimin Film Tablet Vitamins	16.7
Vitiron Vitamins	16.5
Aspilets Antithrombotic Tablets	15.8
BaB Chewable Tablet	13.5
Ray-Ban Sunglasses	12.8
Oramin-G Multivitamins	10.1

Source: MMRD

Top ten advertising categories (2001)

Advertising sector	Newspaper expenditure Kyat (mill)
Baby pharmaceutical	62.4
Car oil/lubricants	61.2
Vitamins	55.7
Electrical products	45.1
Ginseng extracts	37.2
Cosmetics	29.7
Computer training	26.8
Journals	23.2
Movies	18.2
Property	17.2

Source: MMRD

ADVERTISING EXPENDITURE & ECONOMIC DATA

Main economic indicators 1996-2002

	1996	1997	1998	1999	2000	2001	2002
1 US\$=	6.64	Kyat at official 2002 rate (black market rate 800-1,000)					
Gross Domestic Product (Kyat billion)							
at current prices	792	1,120	1,610	2,190	2,426	3,094	4,284
% change	31.0	41.4	43.8	36.1	10.8	27.5	38.5
at 2002 prices	2,942	3,206	3,043	3,497	3,878	4,084	4,284
% change	12.6	9.0	-5.1	14.9	10.9	5.3	4.9
Gross Domestic Product per capita (Kyat 000)							
at current prices	17.6	24.5	34.7	46.5	50.8	64.0	88.6
at 2002 prices	65.3	70.0	65.5	74.2	81.2	84.4	88.6
Population							
Millions	45.1	45.8	46.5	47.1	47.8	48.4	48.4
Consumer Price Index							
2002=100	26.9	34.9	52.9	62.6	62.6	75.8	100.0
% change	16.3	29.7	51.5	18.4	-0.1	21.1	32.0
Advertising Expenditure Growth (%)							
at current prices	-	-	-	13.3	29.1	-29.8	-51.3

Source: IFS, ZenithOptimedia

Advertising expenditure (US\$ 000, in current prices)

	1998	1999	2000	2001	2002
Newspapers	1,700	1,900	2,100	1,500	500
Magazines & journals	500	600	2,100	2,400	1,500
Television	7,800	9,000	11,000	6,400	2,900
Radio	-	-	-	-	-
Cinema	90	100	130	100	100
Outdoor	1,300	1,310	1,340	1,300	700
Total	11,390	12,910	16,670	11,700	5,700

Source: MMRD

Notes: Before discounts, includes agency commission, excludes classified and production costs

POPULATION & MORE FACTS

Population by age and sex

	All individuals		Male		Female	
	000	%	000	%	000	%
0-14	775	43	393	43	383	42
15-64	978	54	490	54	488	54
65+	67	4	29	3	38	4
Total	1,821	100	912	100	909	100

Source: CIA - The World Factbook 2003

Newspaper reach (%)

	Weekly
All adults	14

Source: AC Nielsen

Top dailies (2000)

Title	Circulation (000)	Full page rate (US\$)	
		Mono	Colour
Al Anba	25	4,313	4,963
Al Watan	18	4,191	4,865

Source: ZenithOptimedia

Top press owners (2000)

Advertising sector

DMH
Free Press of Namibia

Source: Agency records

ADVERTISING EXPENDITURE & ECONOMIC DATA

Main economic indicators 1996-2002

	1996	1997	1998	1999	2000	2001	2002
1 US\$= 10.54 N\$ at 2002 rate							
Gross Domestic Product (N\$ million)							
at current prices	15,011	16,752	18,791	20,693	23,264	26,689	-
% change	18.1	11.6	12.2	10.1	12.4	14.7	-
at 2002 prices	25,046	25,691	27,133	27,519	28,383	29,724	-
% change	9.4	2.6	5.6	1.4	3.1	4.7	-
Gross Domestic Product per capita (N\$)							
at current prices	9,266	10,092	11,119	12,031	12,782	14,910	-
at 2002 prices	15,461	15,477	16,055	16,000	15,595	16,606	-
Population							
Millions	1.6	1.7	1.7	1.7	1.8	1.8	1.8
Consumer Price Index							
2002=100	59.9	65.2	69.3	75.2	82.0	89.8	100.0
%change	8.0	8.8	6.2	8.6	9.0	9.5	11.4

Source: IFS, ZenithOptimedia

NAURU

General economic situation

GDP total US\$60 million; GDP per capita US\$4,615 (purchasing power parity; 2001). Consumer price index 111.9 (2001).

Nauru achieved independence from Australia in 1968 and joined the United Nations in 1999. The island is the smallest republic in the world. This insular state is considered to be a tax heaven, and is on the list of 'non-cooperative' countries drawn up by the OECD for the fight against money laundering.

Performance of newspapers vs. other media

The sole radio station is owned and operated by the government; it broadcasts Radio Australia and British Broadcasting Corporation news reports. Local television includes Nauru TV, which is government owned, as well as a privately owned sports network.

Performance of different types of newspapers

Nauru has no regular print media, but several publications appear on an occasional basis. They include the government

(weekly) newspaper, *The Nauru Bulletin*, published in both English and Nauruan, and a newsletter called *The Visionary*, published by the opposition party Naoero Amo. There are also some other newspapers including two fortnightlies, the *Central Star News* and the *Nauru Chronicle*.

Sources: CIA - The World Factbook 2003; US State Department; Reporters Without Borders; International Press Institute; WAN

POPULATION

Population by age and sex

	All individuals		Male		Female	
	000	%	000	%	000	%
0-14	5	38	3	43	2	33
15-64	8	62	4	57	4	67
65+	0	0	0	0	0	0
Total	13	100	7	100	6	100

Source: CIA 2003

General economic situation

GDP total US\$37.32 billion; GDP per capita US\$1,410 (purchasing power parity; 2002). Consumer price index 102.8 (2001).

Performance of newspapers vs. other media

The Broadcast Act allows private television and FM radio broadcasts, but implementation of the act has been slow. The government owned one television station, and controlled one radio station that broadcasts both AM and FM signals. Radio, primarily short and medium wave, reaches the greatest number of persons and has the largest influence. Government-owned Radio Nepal broadcasts throughout the country through a series of repeater stations. With privatisation of a number of radio bands, there has been a marked increase in the range of programming options available.

Two private cable television networks operate in the Kathmandu Valley. They mainly provide entertainment programming. An additional two private operators were granted licences; however, the two operators have not begun broadcasting in 2002. Throughout the country, local entrepreneurs also received international stations via satellite for viewing in local bars, and resold the signal to local residents. Television time on the government-owned television station also was leased to private producers. In addition to the state-owned television station, two private television stations were licensed to produce and broadcast programs.

In 2002, the government expanded to 25 the number of private FM broadcasting licenses; 20 were operating.

Performance of different types of newspapers

There were hundreds of independent vernacular and English-language newspapers available. The government owns *Gorkhapatra* – a Nepali-language daily – and *The Rising Nepal* – the largest English-language daily.

Media/press laws

The Press and Publications Act provides for the licensing of publications and the granting of credentials to journalists. The act also includes penalties for violating these requirements. In addition, the act prohibits publication of material that, among other things, promotes disrespect toward the King or the royal family; that undermines security, peace, order, the dignity of the King, or the integrity or sovereignty of the Kingdom; that creates animosity among persons of different castes and religions; or that adversely affects the good conduct or morality of the public. The act also provides a basis for banning foreign publications; however, foreign publications were widely available.

Distribution

Publishers of newspapers all over the country predominantly distribute newspapers directly, with newspaper boys cycling door to door. There are about 10 well-known newspaper and magazine distributors in Nepal. Of these, at least two are agents for international newspapers and magazines. There are estimates of about 1,000 newspaper outlets in Kathmandu Valley and 1,000 more in the rest of the country. Of these, half are book shops, stationery and grocery stores doubling as newspaper outlets. The commission rate for newspapers and magazines range from 20% to 30% offered to the retailers. All companies have a returns policy, which is normally 25% of the total.

With many English, German and French language publications, Kathmandu Valley accounts for more than 85% of the market. The total size of the newspaper and magazine market is estimated at US\$1.25 million, of which 15% in value is of imported products, excluding India.

Sources: CIA – *The World Factbook 2003*; US State Department; *Distripres Gazette*

POPULATION & MORE FACTS

Population by age and sex

	All individuals		Male		Female	
	000	%	000	%	000	%
0-14	10,505	40	5,425	40	5,080	39
15-64	15,012	57	7,692	57	7,320	57
65+	953	4	469	3	484	4
Total	26,470	100	13,586	100	12,884	100

Source: CIA - *The World Factbook 2003*

Top ten dailies (2002)

Title	Publisher (Language)	Circulation (000)
Kantipur	Kantipur Publications (Pvt) Ltd (in Nepali)	117
The Rising Nepal	Government (in English)	-
Gorkhapatra	Government (in Nepali)	-
The Kathmandu Post	Kantipur Publications (Pvt) Ltd (in English)	35
Space Time Daily/Space Time Dainik	Space Time Publications (Pvt) Ltd (in English and Nepali)	-
Nepal Samacharpatra	(in Nepali)	-
Janasangarasha Daily	-	-
Rajdhani	(in Nepali)	-
The Himalayan Times	(in English)	-
Janadishu	-	-

Source: WAN from public sources

Commentary - Cebuco

For the third successive year the Dutch economy developed negatively. The expected recovery for the second half of the year did not materialize, resulting in a decline of 0.8%, which is the worst figure of the last 20 years. Unemployment rose again. With these results the Netherlands is trailing behind in the EU, with similar effects in the advertising and readership markets. Because of the economic situation, most companies cut their marketing budgets first, and newspapers are the first to feel this because of the short booking notice.

Once again TV increased its share of total advertising spend at the cost of print media. Reports show that time spent watching TV increased over the last year, while reading time for newspapers remained stable. As a result of the general economic low tide, the total volume of advertising in daily newspapers fell by 10%. Over the past three years the volume in daily newspapers has shrunk by over 25%. Main causes are the loss in recruitment-advertising (44% in 2003), and classified advertising (17.6%). The volume of display advertising increased, mostly as a result of the prize-war between supermarket chains. Total net-advertising turnover in 2003 fell 9.4%. Newspapers still faced a decrease in volume of advertising in the first quarter of 2004.

There was an overall decrease in sales of 2.5%. Sales of national titles decreased slightly more than regional titles, which is partly due to competition by the two free dailies. In 2003, two regional titles were combined, and two smaller regional dailies were included in other titles.

For the 5th successive year total circulation decreased (2.5%). A number of daily newspapers have prepared new initiatives to counter this development in early 2004. The regional daily *De Twentsche Courant Tubantia* and national daily *De Telegraaf* are adding a Sunday issue, *Het Parool* has changed its format to tabloid, and *Algemeen Dagblad* has added a daily special *Sports* tabloid section. The new initiatives in 2004 resulted from reader research by the respective titles. Readership remained practically unchanged in 2003.

During 2003 three Dutch newspaper groups started a joint home-delivery of nine different daily newspaper titles (ca. 300,000 copies) in the middle region of the Netherlands. This operation is to continue, but the intended roll-out for other areas of the country will not be carried out yet.

Newspaper websites witnessed a substantial increase in visitors in 2003. The Dutch Newspaper Publishers' Association concluded an agreement with the owners of professional clipping services for approval of digital provision and payment for newspaper editorial copy.

In January 2003 the greater Amsterdam daily newspaper *Het Parool* was sold by the PCM Uitgevers group to a consortium of new owners, amongst which an important position is held by the Belgian publisher, Persgroep. At the end of 2003, PCM Uitgevers group (newspapers and books) started searching for new investors. It is likely that this will lead to more foreign (co-) ownership in 2004.

The situation of the Dutch daily press and the fear of consolidation and loss of plurality in the newspaper market have caused Parliament to question the government about its press policy. Since the beginning of 2002 several reports have been published, but the government is still waiting on three reports, which will be published in 2003/2004. The most important one, which is by the Scientific Council for Government Policy and is expected in Autumn 2004, will give overall recommendations for the total Dutch media scene.

The Dutch State does not support the newspaper industry other than through the possibilities of the Press Fund. The Dutch Newspaper Publishers' Association demands that barriers in the current Media Law, which prevent genuine multi-media chances for newspaper publishers, should be removed as a result of the pending reports and discussions.

Amended Copyright Law (implementation of the EU Copyright directive) will come into force in 2004.

POPULATION

Population by age and sex

	All individuals		Male		Female		Households 000
	000	%	000	%	000	%	
Children	3,010	19	1,540	19	1,470	18	6,797
16-24	1,932	12	984	12	948	12	
25-34	2,326	14	1,175	15	1,151	14	
35-44	2,601	16	1,322	16	1,279	16	
45-54	2,292	14	1,160	14	1,132	14	
55-64	1,812	11	912	11	900	11	
65+	2,219	14	922	12	1,297	16	
Total	16,192	100	8,015	100	8,177	100	

Source: CBS (Statistics Netherlands, 1 January 2003)

Population by social class and sex (2002/03)

	All adults 18+		Male		Female		Households	
	000	%	000	%	000	%	000	%
W1 (High)	3,208	24	1,502	23	1,706	25	1,376	20
W2	2,997	23	1,486	23	1,511	22	1,411	20
W3	2,508	19	1,275	20	1,233	18	1,486	21
W4	3,425	26	1,609	25	1,816	27	1,861	27
W5 (Low)	1,147	9	565	9	582	8	849	12
Total	13,285	100	6,437	100	6,848	100	6,983	100

Source: NOM Print Monitor (Nov 2002 – Oct 2003)

W1 (High) = high education + high income

W2 = high education + middle income/middle education + high income

W3 = high education + middle income/high education + low income/

low education + high income

W4 = middle education + middle income/middle education + low income/

low education + middle income

W5 (Low) = low education + low income

Head of household (2002/03)

	Head	
	000	%
under 25	251	4
25-34	1,310	19
35-44	1,437	21
45-54	1,246	18
55-64	1,260	18
over 65	1,479	21
Total	6,983	100

Source: NOM Print Monitor (Nov 2002 – Oct 2003)

Newspaper reach (%) (2002/03)

	Newspaper reach (%) (2002/03)		
	Daily	Weekly *	Monthly *
All adults 18+	71.4	86.4	92.0
Men	71.7	89.8	93.9
Women	71.1	83.2	90.2
MHS	71.4	84.8	91.0

Source: NOM Print Monitor (Nov 2002 – Oct 2003)

MHS: Main Household Shopper

* 2000/01 data



Households (2002/03)

Occupancy	Households	
	000	%
1 person	2,315	33
2 people	2,435	35
3 people	894	13
4 people	926	13
5 or more people	412	6
Family life cycle		
Young, 1 person (aged <40)	804	12
Old, 1 person (aged >=40)	1,511	22
Young, 2 people (aged <40, no children)	630	9
Old, 2 people (aged >=40, no children)	1,692	24
2+ with young children (min. 1 child aged <14)	1,528	22
2+ with old children (min. 1 child aged >=14, no children <14)	749	11
Rest	70	1
Total	6,984	100

Source: NOM Print Monitor (Nov 2002 – Oct 2003)

Age structure of readership (2002/03)

Age	% of readership	% daily reach within age group
0-14	2	38
15-24	10	58
25-34	16	62
35-44	18	69
45-54	17	77
55-64	19	84
65+	18	84

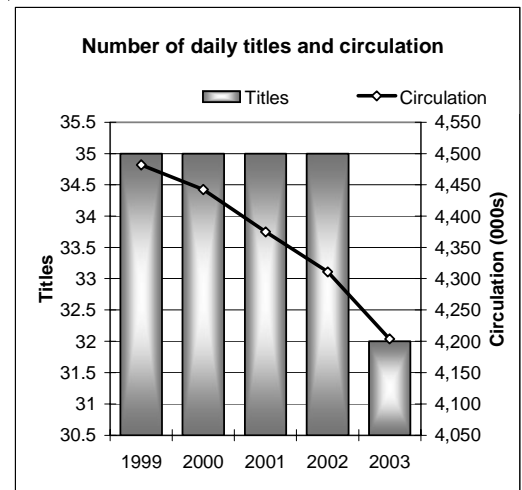
Source: NOM Print Monitor (Nov 2002 – Oct 2003)

NUMBER OF TITLES AND CIRCULATION

	1999	2000	2001	2002	2003	Change (%)	
						99/2003	2002/03
Number of titles							
Total dailies	35	35	35	35	32	-8.57	-8.57
National dailies	11	11	11	11	11	0.00	0.00
Regional dailies	24	24	24	24	21	-12.50	-12.50
Regional non-dailies	54	49	48	46	42	-22.22	-8.70
Free papers ^	770	607	565	557	530	-31.17	-4.85
Dailies	-	3	2	2	2	-	0.00
Non-dailies	-	604	563	555	528	-	-4.86
Circulation (000)							
Total dailies	4,482	4,443	4,375	4,311	4,204	-6.20	-2.48
National dailies	2,165	2,008	2,041	2,004	1,942	-10.30	-3.09
Regional dailies	2,317	2,435	2,334	2,307	2,262	-2.37	-1.95
Regional non-dailies	337	317	313	361	293	-13.06	-18.84
Free papers ^	31,000	20,750	20,526	20,392	19,326	-37.66	-5.23
Dailies	-	750	875	735	652	-	-11.29
Non-dailies	-	20,000	19,651	19,657	18,674	-	-5.00
Total annual sales (millions of copies)							
Dailies	1,376	1,364	1,338	1,333	1,290	-6.25	-3.23
Non-dailies	24	23	23	-	-	-	-
Free papers	-	250	-	186	174	-	-6.45

Source: Cebuco, HOI (Oct 2002 - Sept 2003)

^ For free newspapers, dailies are generally distributed outdoors/on public transport, while non-dailies are normally delivered door-to-door.



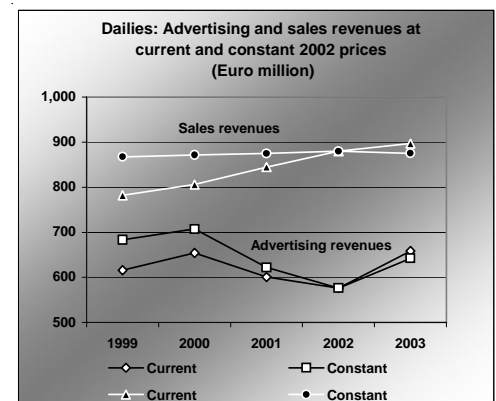
MORE FACTS

	1999	2000	2001	2002	2003	Change (%)	
						99/2003	2002/03
Advertising revenues (Euro million)							
Dailies	616	654	601	576	658	6.87	14.24
Dailies §	683	707	622	576	642	-6.03	11.46
Non-dailies and free papers	21	38	48	59	83	296.14	41.26
Sales revenues (Euro million) *							
Dailies	782	806	845	880	897	14.73	1.93
Dailies §	868	872	875	880	875	0.87	-0.55
Non-dailies	12	12	12	12	-	-	-
Volume of advertising sold (pages & page equivalent)							
Total	39,681	41,568	37,917	35,668	38,062	-4.08	6.71
In colour	16,211	19,173	16,557	14,909	19,244	18.71	29.08

Sources: BBC/VEA, Cebuco

§ at constant 2002 prices

* Figures do not include VAT





Media consumption (minutes per day)

	1999	2000	2001	2002	2003
Newspapers *	38.8	39.1	40.7	39.9	41.3
Television	148.3	150.5	148.2	148.2	-

Source: NOM Print Monitor (Nov 2002 – Oct 2003)

All respondents 13+

* daily newspapers, including free dailies Metro and Splts from 2001

Cover prices

	Euro
Single copy	0.96-1.65
Subscription	0.57-1.27

Distribution and newsprint costs

	1999	2000	2001	2002	2003
As % of average cover price					
Single copy sales	35.0	35.0	35.0	33.0	35.0
Home deliveries ^	27.5	31.0	32.0	31.0	31.0
Postal deliveries ^	33.0	33.0	30.0	40.0	39.0
Average cost per copy per day					
Subscription Euro	0.16	0.18	0.20	0.21	0.24
Single copy Euro	0.32	0.32	0.32	0.33	0.33
Newsprint costs (average per ton)					
Euro	475-525	500-545	590-640	540	500-525

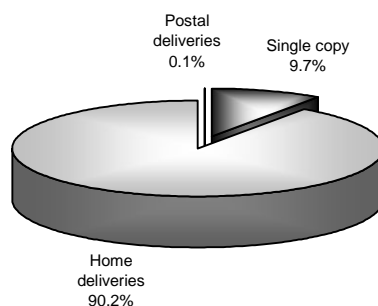
^ as a % of the subscription price

Type of newspaper sales (%)

	Single copy	Home deliveries	Postal deliveries
1999	9.9	90.1	0.0
2000	10.5	89.4	0.1
2001	10.0	89.9	0.1
2002	9.7	90.2	0.1
2003	9.7	90.2	0.1

Source: Cebuco

Type of newspaper sales in 2003 (%)



Top ten publishing companies (2003)

(ranked by total circulation)

Holdingmaatschappij De Telegraaf
Wegener
PCM Uitgevers
Noordelijke Dagblad Combinatie
Het Parool
Reformatorisch Dagblad
Het Financieel Dagblad
Nederlands Dagblad
Friesch Dagblad Holding
Koninklijke BDU Uitgeverij

Source: BBC, Cebuco

Top ten advertising categories (2003)

Advertising sector	% of display ad revenue
Food	10.3
Electronics	8.2
Auto	6.9
Travel and tourism	6.4
Furniture	4.6
Charity institutions	3.9
Other retail	2.7
Telecommunications	2.6
Estate agents	2.5
Internet sites	2.3

Source: BBC

Top ten advertisers (2003)

Advertiser	Newspaper expenditure Euro (000)
Laurus	18,522
Seats & Sofas	17,431
Lidl	16,016
Kras Reizen	15,923
Media Markt	12,883
Aldi	12,438
KPN	12,229
Correct	9,857
Wegener Emedia	9,742
De Telegraaf	7,098

Source: BBC

Contribution of classified and display advertising to total advertising income (%)

	1999	2000	2001	2002	2003
Display	67.9	68.5	66.6	67.6	73.3
Classified	32.1	31.5	33.4	32.4	26.7

Source: BBC

Top ten dailies (2003)

Title	Publisher	Circulation (000)	Readership (000)	Cover Price		Format	Full page rate (Euro)	
				(Euro)	US\$		Mono	Colour
De Telegraaf	Holdingmij. De Telegraaf	776	2,492	1.05	0.99	Broadsheet	39,070	57,303
de Volkskrant	PCM Uitgevers	323	854	1.20	1.13	Broadsheet	23,155	31,996
Algemeen Dagblad	PCM Uitgevers	303	1,029	1.10	1.03	Broadsheet	20,405	28,196
NRC Handelsblad	PCM Uitgevers	262	475	1.25	1.18	Broadsheet	26,455	36,556
De Gelderlander	Wegener	193	607	1.20	1.13	Broadsheet	15,455	20,513
Dagblad de Limburger	Holdingmij. De Telegraaf	164	464	1.15	1.08	Broadsheet	18,315	24,309
Noordhollands Dagblad	Holdingmij. De Telegraaf	155	505	1.15	1.08	Broadsheet	12,540	16,644
Brabants Dagblad	Wegener	153	494	1.15	1.08	Broadsheet	11,880	15,768
B/N DeStem	Wegener	140	401	1.20	1.13	Broadsheet	11,220	14,892
Twentsche Courant Tubantia	Wegener	136	360	1.25	1.18	Broadsheet	10,945	14,527

Online readership

Newspaper (Number of unique visitors)	2002	2003
De Telegraaf	2,650,000	3,150,000
NRC Handelsblad	1,780,344	2,000,649
de Volkskrant	1,600,000	1,700,000
Algemeen Dagblad	1,400,000	1,000,000
Trouw	537,589	485,231

Source: Webwereld

Daily newspaper colour capability & formats

Number of:	1999	2000	2001	2002	2003
4-colour newspapers	34	35	35	35	32
Broadsheets	35	35	35	35	32

Internet publishing (No. of online editions)

	1999	2000	2001	2002	2003
Dailies	30	35	35	35	32

Source: Cebuco

Employment & salary (daily newspapers only)

	1999	2000	2001	2002	2003
Total no. of Journalists	4,228	4,400	4,450	4,300	4,200
Total no. of Employees	12,500	12,500	12,300	11,800	10,300
Total salary costs Euro (million)	457	481	450	502	-

Source: NUV



CROSS MEDIA OWNERSHIP

Owners	Regional TV	National TV	Regional Newspapers	National Newspapers	Radio
Regional Newspaper Owners	Max 50% in relevant market	Max 25% in relevant market	General Competition Law applies		Max 50% in relevant market
National Newspaper Owners	Max 50% in relevant market	Max 25% in relevant market	General Competition Law applies		Max 25% in relevant market
Local Radio Licensees	General capital law applies	General capital law applies	General capital law applies	General capital law applies	Per licence. Only one FM frequency
National Radio Licensees	General capital law applies	General capital law applies	General capital law applies	General capital law applies	Per licence. Only one FM frequency

This table applies only to private (commercial) market parties. It does not apply to public radio or television. The Dutch Media Act has only one cross-ownership article (71B).

ADVERTISING EXPENDITURE & ECONOMIC DATA

Advertising expenditure	(Euro million, in current prices)										
	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
Newspapers	1,359	1,442	1,621	1,690	1,780	1,710	1,577	1,368	1,409	1,423	1,465
Magazines	662	739	826	880	941	925	885	794	778	778	770
Television	534	572	626	678	783	750	792				
Radio	134	164	177	194	235	219	229				
Cinema	10	10	11	12	13	9	7				
Outdoor	95	104	112	121	139	137	137				
Internet	0	0	0	21	38	33	28				
Total	2,794	3,031	3,373	3,596	3,929	3,783	3,655	3,355	3,426	3,453	3,514

Source: 1996-2002 VEA/BBC, 2003-2006 ZenithOptimedia

Notes: Excludes production costs and agency commission, includes classified, after discounts
The measurement methodology changed in 1998, hence the large change in figures that year

Main economic indicators 1996-2002

	1996	1997	1998	1999	2000	2001	2002
1 US\$= 1.06 Euro at 2002 rate							
Gross Domestic Product (Euro billion)							
at current prices	300	319	341	374	403	429	445
% change	3.5	6.3	6.7	9.8	7.6	6.6	3.7
at 2002 prices	355	369	386	415	435	444	445
% change	5.0	4.0	4.6	7.5	4.9	2.0	0.1
Gross Domestic Product per capita (Euro 000)							
at current prices	19.3	20.5	21.7	23.7	25.3	26.8	27.7
at 2002 prices	22.8	23.7	24.6	26.3	27.4	27.7	27.7
Population							
Millions	15.5	15.6	15.7	15.8	15.9	16.0	16.0
Consumer Price Index							
2002=100	84.6	86.5	88.2	90.1	92.4	96.6	100.0
% change	2.0	2.2	2.0	2.2	2.6	4.5	3.5
Ad.spend as a % of GDP							
	0.93	0.95	0.99	0.96	0.98	0.88	0.82
Advertising Expenditure Growth (%)							
at current prices	11.9	8.5	11.3	6.6	9.3	-3.7	-3.4
at 2002 prices	9.7	6.2	9.1	4.3	6.5	-7.8	-6.7

Source: IFS, ZenithOptimedia

Research

Circulation is audited by: Het Oplage Instituut (HOI)

Readership is measured by: National Onderzoek Multimedia (NOM)

Taxes

VAT on: sales 6% advertising 19%
newsprint 19% plant 19%
composition 19% (standard VAT rate 19%)
Profits are taxed at 30% up to Euro 22,689 and 34.5% thereafter; newspapers are treated no differently from other businesses.

Subsidies

There are no direct subsidies. However, newspapers and magazines may apply to the Press Fund for subsidies for new ventures.

Discounts

on: post 0 rail 0 telephone 0 telegraph 0 telex 0

Ownership

Does any law exist governing publishing-house ownership, or the registration of shares in newspaper-publishing companies? Since 1 January 1998 general Competition Legislation has applied to ownership and market behaviour.

Is there any law prohibiting or restricting foreign companies or individuals from owning shares, and in particular, the majority of shares, of domestic daily newspapers? No

Is there any law prohibiting daily newspaper or periodical publishers from operating radio or television stations in the same locality? Publishers are free to invest in commercial radio and TV at the regional or local level, provided that frequencies or cable channels are available.

So as to guarantee disclosure and transparency in the capital structure and to avert silent partnerships, is there a law or rule making it possible to determine who actually owns a publishing company? Owners of more than 5% of the capital stock must declare their shares.

Is there an antitrust law limiting concentration in the daily press? Since 1 January 1998 the general Competition Law has made the sector's self-regulation code redundant. The Competition Authority must be notified of any merger in which participating companies have a combined turnover of over Euro 113.5 million and at least two of them have a turnover within The Netherlands of minimum Euro 30 million.

Is further regulation of media concentration expected? The government is debating the role of newspaper regulation, but has produced no firm proposals.

NETHERLANDS ANTILLES

General economic situation

GDP total US\$2.4 billion; GDP per capita US\$11,111 (purchasing power parity; 2002). Consumer price index 100.4 (2002).

Performance of newspapers vs. other media

Standard US television stations are available through the local cable system and satellite TV.

Performance of different types of newspapers

There are two Dutch daily newspapers: *Amigoe* (published in Curacao) and *Algemeen Dagblad Caribbean Edition*. *Amigoe* is the oldest daily newspaper in the Netherlands Antilles. It is published every evening except Sundays. *Amigoe* is the only

evening paper in Dutch, the official language of the Netherlands Antilles. A separate daily edition is printed for Aruba. Local English-language newspapers are *The Daily Herald* (published daily at Saint Martin), *Today*, and *St Maarten Guardian*. *St. Martin's Week* is published in English and French. The *Bonaire Reporter Weekly* is published on Bonaire. Most other newspapers in the Netherlands Antilles are published in Dutch or Papiamentu. An international version of the *Miami Herald* is printed on the island of Saint Martin. International versions of the *New York Times*, *USA Today* and *The Wall Street Journal* and leading newspapers from the Netherlands, Germany and France are available.

Sources: CIA – *The World Factbook 2003*; WAN from public sources

POPULATION & MORE FACTS

Population by age and sex

	All individuals		Male		Female	
	000	%	000	%	000	%
0-14	54	25	28	27	26	23
15-64	145	67	69	66	76	68
65+	17	8	7	7	10	9
Total	216	100	104	100	112	100

Source: CIA – *The World Factbook 2003*

Top dailies (2003)

Title	Publisher (language)	Cover Price	
		NA Guilder	US\$
Amigoe	Uitgeverij Amigoe NV (in Dutch)	-	-
Algemeen Dagblad	(in Dutch)	-	-
The Daily Herald	The Caribbean Herald NV (in English)	1.00	0.50

Source: WAN from public sources

NEW CALEDONIA

General economic situation

GDP total US\$3 billion; GDP per capita US\$14,218 (purchasing power parity; 2002). Consumer price index 99.4 (2000 estimate).

Performance of newspapers vs. other media

There are several AM and FM radio stations. There are two public television stations (Tele Nouvelle Calédonie and Tempo) and one private station (Canal+).

Performance of different types of newspapers

Newspapers include one daily, two weeklies and a monthly. The only daily paper in New Caledonia is *Les Nouvelles Calédoniennes*, published in French. Some English newspapers and magazines are available in bookshops.

Sources: CIA – *The World Factbook 2003*; WAN from public sources

POPULATION & MORE FACTS

Population by age and sex

	All individuals		Male		Female	
	000	%	000	%	000	%
0-14	63	30	32	30	31	30
15-64	135	64	68	64	67	64
65+	13	6	6	6	7	7
Total	211	100	106	100	105	100

Source: CIA – *The World Factbook 2003*

Top dailies (2003)

Title	Publisher
Les Nouvelles Calédoniennes	S.A.R.L. Pacifique Presse Communication

Source: WAN from public sources

	2002
Number of titles	
Total dailies	1

source: WAN from public sources

Commentary – Newspaper Publishers' Association of New Zealand*General economic situation*

Robust economic growth (3.3% to March 2004) has stimulated improvement in newspaper industry revenues throughout the country, and the outlook for 2004 is strong.

Performance of newspapers vs. other media

Newspapers have the largest share (just over 40%) of the advertising market in New Zealand, followed by television, radio and magazines. Even in national advertising daily newspapers are a strong competitor to television, thanks partly to the single-desk marketing, booking and billing services provided by the Newspaper Advertising Bureau, which is owned collectively by the daily newspapers.

Performance of different types of newspapers

All four of New Zealand's metropolitan newspapers are morning titles. There are 17 regional evenings, three regional morning titles and two Sundays. There is very little direct competition between titles although the two main groups – Fairfax New Zealand Limited and APN New Zealand – compete commercially.

Newspaper launches/closures

No daily newspapers launched or closed during 2003, although one regional evening – the *Waikato Times* – began publishing its Saturday edition in the morning. APN – owners of *The New Zealand Herald* in Auckland, the country's largest metropolitan daily – began publishing the *Auckland* as a community title with six different editions, each focused on different geographic community in the city. *The New Zealand Herald* also launched a magazine called *Canvas*, which is included in the Saturday edition of the newspaper.

Advertising

As well as being stimulated by overall economic growth, newspaper advertising was expanded in 2003 by two one-off events – a nationwide electricity supply crisis and the recall of branded dietary supplements.

Circulation

Circulation figures for the year ending 31 March 2004 are not yet available. Results in the six-month period to September 2003 were mixed, but the overall trend was a slight reduction in circulation.

Readership

The latest National Readership Survey data release shows that daily newspapers are maintaining their position as a highly effective advertising medium. On a typical day, daily newspapers reach 1,654,000 (or 54%) of New Zealanders aged 15+, and each week 80% of people aged 15+ will read at least one daily newspaper. This equates to a 1,929,000 New Zealanders.

Daily newspapers reach over 70% of people with a personal income of over NZ\$60,000 a year, and 62% of those in the top three occupational segments. The importance of newspapers as a medium for reaching both business and household decision makers has also been reinforced, with 64% of business decision-makers and 61% of homeowners reading a daily

newspaper on a typical day.

Online/digital publishing

Both the two main newspaper groups in New Zealand have a large news website. Fairfax NZ Ltd runs www.stuff.co.nz and APN's site is www.nzherald.co.nz.

Ownership

An important ownership change occurred in 2003 when John Fairfax & Co in Australia bought two metropolitan titles, seven regional dailies, two national Sundays, 53 community newspapers and a number of magazines from INL Ltd (controlled by News Corp) for NZ\$1,188 million. John Fairfax & Co established Fairfax New Zealand to run them.

Media/press laws

Constant vigilance by the industry maintains a high level of press freedom in New Zealand, though freedom has been under regular threat from insidious attempts by government to regulate in areas such as name suppression, cameras in courts and parliament and privacy.

Copyright

The newspaper industry in New Zealand, through the Newspaper Publishers Association (NPA), has established the Print Media Copyright Agency (PMCA) to license organisations copying press clippings under the terms of the Copyright Act 1994, which reserves copyright of editorial material in newspapers solely to the publishers.

Other factors

A new Employment Relations Law Reform Bill is currently being debated in the country's legislature that could, if passed in its current form, damage employment in the newspaper industry, promoting, among other things, stronger roles for unions in collective bargaining etc. This follows new legislation to increase the annual holiday entitlement for employees in New Zealand from three to four weeks, which again will add to the cost of employment.

Daily newspapers in New Zealand through the NPA support a number of self-regulatory organisations which together limit the involvement of government in the industry, including the New Zealand Press Council and the Advertising Standards Authority (ASA) with its associated Advertising Standards Complaints Board. These organisations were particularly active during 2003. The ASA focused on work being done to harmonise regulation of many sectors of the economy between Australia and New Zealand, as part of the Closer Economic Relationship free trade agreement (CER). This work by the ASA is designed particularly to protect the strong self-regulatory focus in New Zealand.

In 2003 the Court of Appeal (the second highest court in the country's legal system) heard an important case for press freedom, which related to the publication of photographs taken in a public place of the children of a high profile television personality. The case may affect the common-law position of privacy in the country; at the moment there is no tort of privacy under New Zealand law.



POPULATION

Population by age and sex

	Individuals 10+		Male		Female		Households 000
	000	%	000	%	000	%	
10-14	305	9	157	10	148	9	1,300
15-24	577	17	304	19	273	16	
25-34	531	16	249	15	282	16	
35-44	602	18	282	17	320	19	
45-54	505	15	247	15	258	15	
55-64	376	11	194	12	182	11	
65+	468	14	205	13	263	15	
Total	3,364	100	1,638	100	1,726	100	

Source: Nielsen Research Services "National Readership Survey" (Survey Period Feb-Dec 2003) Sample size = 12,000

Population status

	All adults 15+		Male		Female	
	000	%	000	%	000	%
NZ SEI Level 1	169	6	86	6	83	5
NZ SEI Level 2	452	15	208	14	244	15
NZ SEI Level 3	603	20	308	21	295	19
NZ SEI Level 4	705	23	355	24	350	22
NZ SEI Level 5	551	18	261	18	290	18
NZ SEI Level 6	493	16	226	15	267	17
NZ SEI Other	86	3	38	3	48	3
Total	3,059	100	1,482	100	1,577	100

Source: Nielsen Research Services "National Readership Survey" (Survey Period Feb-Dec 2003) Sample size = 11,161

NZ SEI Level 1: Top professionals

NZ SEI Level 2: Business & public service professionals

NZ SEI Level 3: Managers, sales, service & entertainment workers

NZ SEI Level 4: Trades workers & clerks

NZ SEI Level 5: Semi-skilled workers

NZ SEI Level 6: Unskilled workers

NZ SEI Other: People who do not fit into the above classification system, or have not had a previous occupation.

Age structure of readership

Age	% of readership	% reach within age group
10-14	3.9	22.2
15-24	12.7	37.8
25-34	14.1	45.7
35-44	17.8	50.9
45-54	18.0	61.4
55-64	14.3	65.5
65+	19.2	70.6

Source: Nielsen Research Services "National Readership Survey" (Survey Period Feb-Dec 2003) Sample size = 11,161

NUMBER OF TITLES AND CIRCULATION

	1999	2000	2001	2002	2003	Change (%)	
						99/2003	2002/03
Number of titles							
Total dailies	26	26	26	24	24	-7.69	0.00
Regional & local dailies	26	26	26	24	24	-7.69	0.00
Non-dailies	122	125	119	120	122	0.00	1.67
National non-dailies	2	2	2	3	3	50.00	0.00
Regional & local non-dailies	8	8	8	6	6	-25.00	0.00
Free non-dailies	112	115	109	111	113	0.89	1.80
Sundays	2	2	2	2	2	0.00	0.00
Circulation (000)							
Total dailies	780	777	764	745	739	-5.26	-0.81
Regional & local dailies	798	777	764	745	739	-7.39	-0.81
Non-dailies	2,727	2,746	2,767	2,718	2,833	3.89	4.23
National non-dailies	50	49	45	46	44	-11.95	-4.35
Regional & local non-dailies	23	23	23	22	22	-3.37	0.00
Free non-dailies	2,654	2,675	2,699	2,650	2,767	4.25	4.42
Sundays	310	322	320	311	314	1.43	0.96
Total annual sales (millions of copies)							
Dailies	242.2	242.0	238.1	231.7	229.6	-5.20	-0.91
Regional & local dailies	242.2	242.0	238.1	231.7	229.6	-5.20	-0.91
Non-dailies	188.9	183.8	185.0	189.5	193.0	2.17	1.85
National non-dailies	2.6	-	-	2.4	2.3	-11.54	-4.17
Regional & local non-dailies	2.6	-	-	2.7	2.8	7.69	3.70
Free non-dailies	183.7	180.1	181.5	184.4	187.9	2.29	1.90
Sundays	16.1	16.8	16.6	16.2	16.3	1.25	0.62

Persons with household duties as main occupation

	Housewives	
	000	%
15-24	24	11
25-34	65	29
35-44	62	27
45-54	45	20
55-64	27	12
over 65	4	2
Total	227	100

Source: Nielsen Research Services "National Readership Survey" (Survey Period Feb-Dec 2003) Sample size = 11,161

Households

Occupancy	Adults 15+	
	000	%
1 person	313	10
2 people	964	32
3 people	555	18
4 people	606	20
5 or more people	622	20
without children	1,880	61
with children	1,180	39
with children aged 0-4	527	17
with children aged 5-9	549	18
with children aged 10-15	594	19
Total	3,060	100

Source: Nielsen Research Services "National Readership Survey" (Survey Period Feb-Dec 2003) Sample size = 11,161

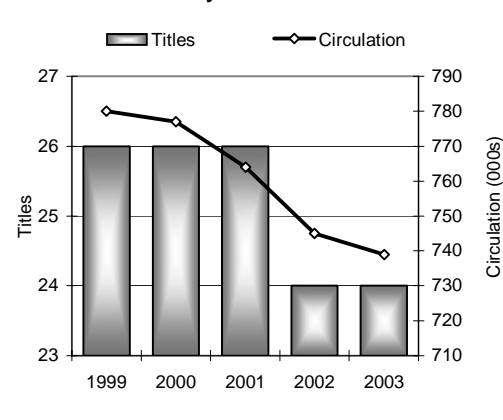
Newspaper reach (%)

	Daily
All adults (15+)	54.1
Men	56.0
Women	52.2
MHS	54.8

Source: Nielsen Research Services "National Readership Survey" (Survey Period Feb-Dec 2003) Sample size = 11,161

MHS: Main Household Shopper

Number of daily titles and circulation

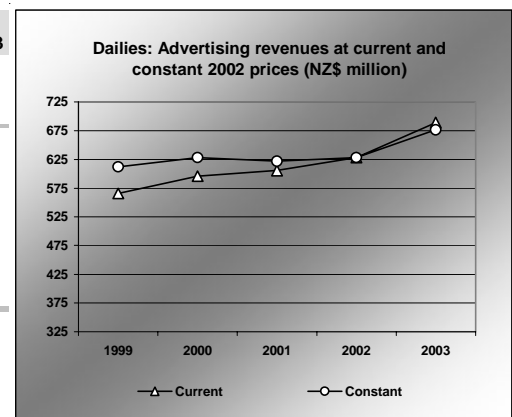




MORE FACTS

	1999	2000	2001	2002	2003	Change (%)	
						99/2003	2002/03
Advertising revenues (NZ\$ million)							
All newspapers	566.0	596.0	606.0	628.0	689.0	21.7	9.7
All newspapers §	612.0	628.2	621.9	628.0	676.8	10.6	7.8
Sales revenues (NZ\$ million)							
Dailies	-	-	-	-	230.3	-	-
Dailies §	-	-	-	-	226.3	-	-
Regional & local dailies	-	-	-	-	230.3	-	-
Non-dailies	-	-	-	-	10.6	-	-
National non-dailies	-	-	-	-	10.0	-	-
Regional & local non-dailies	-	-	-	-	0.6	-	-
National Sundays	-	-	-	-	21.3	-	-

§ at constant 2002 prices
Includes classified, inserts and agency commission, after discounts



Top publishing companies (2003)

	Total circulation per issue
Fairfax New Zealand	1,857,128
APN New Zealand	1,125,880
Allied Press	189,292

Source: New Zealand Audit Bureau of Circulations

Top ten product categories (2003)

Sector	% of total advertising spent in daily newspapers
Food	11
Leisure & entertainment	6
Retail	18
Auto	14
Toiletries & cosmetics	1
Government	12
Beverages	3
Investment, finance & banking	23
Home improvement	11
Telecommunications	13

Source: Nielsen Media Research

Top ten advertisers (2003)

Advertiser	Newspaper expenditure NZ\$ (000)
Foodstuffs NZ	19,268
Progressive Enterprises	12,551
Farmers Trading	12,359
Telecom Corp Of NZ	11,504
Smiths City	10,169
Pacific Retail Group	10,114
The Warehouse	6,611
Woolworths (NZ)	6,063
Vodafone New Zealand	5,289
Bond & Bond	4,600

Source: Nielsen Media Research Jan-Dec 2003

Note: expenditure measured at ratecard prices

Top ten dailies (2003)

Title	Publisher	Circulation (000)	Readership (000)	Cover Price		Format	Full page rate (NZ\$)	
				NZ\$	US\$		Mono	Colour
The New Zealand Herald	APN New Zealand	211	603	1.20	0.56	Broadsheet	16,924	25,385
The Dominion Post	Fairfax New Zealand	99	261	1.00	0.46	Broadsheet	9,576	14,364
The Press	Fairfax New Zealand	91	222	0.90	0.42	Broadsheet	7,610	10,655
Otago Daily Times	Allied Press	45	107	0.80	0.37	Broadsheet	4,984	6,479
Waikato Times	Fairfax New Zealand	41	104	0.90	0.42	Broadsheet	5,746	6,531
Hawke's Bay Today	APN New Zealand	30	66	1.00	0.46	Broadsheet	5,363	6,113
The Southland Times	Fairfax New Zealand	30	63	0.75	0.35	Broadsheet	4,169	5,836
The Daily News	Fairfax New Zealand	27	55	0.80	0.37	Broadsheet	4,034	4,554
Bay of Plenty Times	APN New Zealand	23	54	0.90	0.42	Broadsheet	5,401	5,951
Manawatu Standard	Fairfax New Zealand	20	50	0.80	0.37	Broadsheet	4,480	5,010

Source: Nielsen Media Research

Cover prices

	NZ\$
Single copy	0.60-1.20

Newsprint costs

	2003
Newsprint costs (average per ton) NZ\$	1,220

Newspaper colour capability & formats

Number of:	1998	1999	2000	2001
4-colour newspapers	29	26	26	26
Broadsheets	27	25	25	25
Tabloids	2	1	1	1

Employment

	1997	1998	1999	2000	2001
Total no. of Journalists	1,098	1,110	1,099	1,095	1,106
Total no. of Employees	4,968	5,280	5,364	4,565	4,614

Media consumption (minutes per day, adults 15+)

	1999	2000	2001	2002	2003
Regional dailies (Mon-Fri)	37.4	36.9	36.6	38.3	39.9
Regional dailies (Sat)	59.6	62.8	54.4	58.3	60.1
National Sundays	45.2	46.0	-	-	-
Free community papers	19.2	19.5	18.1	19.4	20.5

Source: Nielsen Research Services "National Readership Survey" (Survey Period Feb-Dec 2003) Sample size = 11,161



ADVERTISING EXPENDITURE & ECONOMIC DATA

Main economic indicators 1996-2002

	1996	1997	1998	1999	2000	2001	2002
1 US\$= 2.16 NZ\$ at 2002 rate							
Gross Domestic Product (NZ\$ billion)							
at current prices	97	100	101	105	111	120	126
% change	4.6	3.2	0.6	4.1	5.5	8.5	5.1
at 2002 prices	107	109	109	113	117	123	126
% change	2.2	2.0	-0.6	4.2	2.9	5.7	2.4
Gross Domestic Product per capita (NZ\$ 000)							
at current prices	26.1	26.6	26.6	27.5	28.9	31.2	32.8
at 2002 prices	28.9	29.1	28.7	29.7	30.4	32.0	32.8
Population							
Millions	3.7	3.8	3.8	3.8	3.8	3.9	3.9
Consumer Price Index							
2002=100	90.4	91.4	92.6	92.5	94.9	97.4	100.0
% change	2.3	1.1	1.2	-0.1	2.6	2.7	2.6
Ad.spend as a % of GDP	1.40	1.37	1.35	1.36	1.34	1.24	1.24
Advertising Expenditure Growth (%)							
at current prices	2.9	1.1	-0.7	4.4	4.6	0.2	5.2
at 2002 prices	0.5	0.0	-1.9	4.5	1.9	-2.4	2.5

Source: IFS, ZenithOptimedia

Advertising expenditure

(NZ\$ millions, in current prices)

	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
Newspapers	552	570	543	566	596	606	628	670	680	670	670
Magazines	140	145	150	159	157	166	173	185	191	195	191
Television	478	465	473	487	501	479	516				
Radio	165	172	170	178	190	196	203				
Cinema	7	8	10	12	13	9	8				
Outdoor/Transport	12	9	14	18	28	32	37				
Total	1,354	1,369	1,360	1,420	1,485	1,488	1,565	1,704	1,754	1,758	1,743

Source: 1996-2002 AAA, media owners, 2003-2006 ZenithOptimedia

Notes: Includes agency commission, classified advertising, excludes production costs, after discounts

Research

Circulation is audited by: New Zealand Audit Bureau of Circulations

Readership is measured by: Nielsen Media Research

Methodology: 12,000 face-to-face interviews each year, conducted between February and December, with one respondent per household.

Taxes

VAT on: sales 12.5% advertising 12.5%
 newsprint 12.5% plant 12.5%
 composition 12.5% (standard VAT rate 12.5%)

Newspapers are subject to the same 33% tax rate on profits as other private companies.

Subsidies

Are there subsidies for the purchase of newsprint? No

Are loans granted at low interest rates for re-equipping or improving existing equipment? No

Discounts

on: post 0 rail 0 telephone 0 telegraph 0 telex 0

There are no reductions on charges for newspapers just because they happen to be a communication medium.

Ownership

Does any law exist governing publishing-house ownership, or the registration of shares in newspaper-publishing companies? No. Newspaper publishing companies are subject to the same laws as other private companies.

Is there any law prohibiting or restricting foreign companies or individuals from owning shares, and in particular, the majority of shares, of domestic daily newspapers? No

Is there any law prohibiting daily newspaper or periodical publishers from operating radio or television stations in the same locality? No

So as to guarantee disclosure and transparency in the capital structure and to avert silent partnerships, is there a law or rule making it possible to determine who actually owns a publishing company? All private companies must be registered for various legal and business purposes. Newspapers are no exception. No special rules or exemptions apply to newspapers.

Is there an antitrust law limiting concentration in the daily press? All competitive business activity is governed by the Commerce and Fair Trading Acts. Newspapers, and the media in general, are subject to the limitations on market dominance imposed by these Acts, as are all enterprises.

Is further regulation of media concentration expected? No

General economic situation

GDP total US\$11.16 billion; GDP per capita US\$2,176 (purchasing power parity; 2002). Consumer price index 103.7 (2002).

Performance of newspapers vs. other media

The news medium with the largest national audience is radio; however, polls show that television is the primary source of news in the cities. There are 174 chartered radio stations in the country: 68 AM stations and 106 FM stations. Listeners receive a wide variety of political viewpoints, especially on the 67 stations based in Managua. There are 12 Managua-based television stations, seven of which carry news programming, some with noticeable partisan political content. In addition, there are 70 cable television franchises that offer services in most large and medium-sized cities.

Performance of different types of newspapers

Nicaragua's print media are partisan, representing pro- and anti-government positions.

Advertising

Most advertising takes place on the radio, in newspapers, on television, and, to a lesser extent, via internet and through billboards. The new government treated newspapers more fairly, distributing advertising dollars according to circulation rather than following the previous practice of showing bias towards pro-government papers. The administration of

President Bolanos attempted to standardise the way that governmental advertising funds were allocated to the various media outlets by implementing a system based on market share. This forced some smaller media outlets to close because they were largely dependent upon government funding, and there was not enough private advertising to support them.

Employment

In March 2001, the National Assembly unanimously approved a law proposing a professional journalists' guild. The law required journalists to have a diploma in journalism and belong to a 'journalists' institute' if they wanted to work in the profession. The vagueness of language concerning the government's role in establishing and regulating journalists' salaries, and its possible role in governing a professional journalists' association — and thereby journalism itself in the country — remained a concern to many observers. The law was to take effect with stipulations that formation of the guild occur within three months. However, the commission that would structure the journalists' guild had not been established by year's end due to conflicts between rival journalist associations whose members were to be grandfathered into the guild. Consequently, the law had no practical consequence during the year.

Source: CIA - The World Factbook 2003; Freedom House; US State Department; BBC News; Reporters without Borders

POPULATION & MORE FACTS

Population by age and sex

	All individuals		Male		Female	
	000	%	000	%	000	%
0-14	1,934	38	985	38	949	37
15-64	3,038	59	1,510	59	1,528	60
65+	156	3	68	3	88	3
Total	5,128	100	2,563	100	2,565	100

Source: CIA - The World Factbook 2003

Top dailies (2003)

Title	Publisher	Circulation (000)
La Prensa	La Prensa, S.A.	35
El Nuevo Diario	-	30
La Noticia	-	14

Source: WAN from public sources

General economic situation

GDP total US\$ billion; GDP per capita US\$ (purchasing power parity; 2002).

Performance of newspapers vs. other media

The government-owned Radio Voix du Sahel transmits 14 hours per day, providing news and other programmes in French and several local languages. There were several private radio stations, including Radio France International, Africa Number One, Radio et Musique, Radio Souda, Radio Tenere, Radio Anfani, and Radio Tambara; the last five were owned locally and feature popular news programmes in local languages, including Djerma and Hausa. These private radio stations generally were less critical of government actions than were the private newspapers. Radio Anfani and Radio et Musique presented news coverage that included a variety of points of view. The other private domestic radio stations were smaller and offered little domestic news programming. The government-operated multilingual national radio service provided equitable broadcasting time for all political parties during the year.

During 2002, the government's Superior Council on Communication continued to allow domestic broadcasting

services to rebroadcast programmes of foreign origin, such as Voice of America (VOA), British Broadcasting Corporation (BBC), Deutsche Welle programmes, and Radio France International (RFI).

Television was a far less important medium than radio. The government-owned Tele-Sahel broadcast approximately four hours every evening, with programming emphasizing news in French and other major national languages. The government-owned TAL-TV had a similar broadcast schedule. A private television station, TV Tenere, broadcast approximately seven hours a day on weekdays and 12 hours a day on weekends. In addition to entertainment programmes, TV Tenere transmitted its own evening news programme, which included reports from French and Swiss sources, as well as other French language European news programmes in their entirety. The director of a private radio station operated a wireless cable television service for the capital, offering access to international channels.

Performance of different types of newspapers

The government published a French-language daily newspaper - *Le Sahel* - and its weekend edition. There were approximately 12 private French-language weekly or monthly



newspapers, some of which were affiliated loosely with political parties. Foreign journals circulated and reported freely.

Media/press laws

The government continued to use existing law to criminalise slander and libel and to prosecute, convict, and sentence to prison critics who infringe those laws in the judgment of the courts.

Taxes

In 2001, the government eliminated the subsidies and preferential tax treatment on newsprint and other supplies. Since 1999 press institutions had had to pay for only an annual trading licence of 160,000 to 200,000 CFA francs (€244 to €305).

In terms of the new law, they additionally have to pay a tax on industrial and commercial revenue, value-added tax, an apprenticeship tax calculated on the basis of the wage bill, and a land tax for owners of their own premises. They also have to have an accounting department and submit an annual statement of accounts.

Employment

Strict accreditation requirements were imposed on domestic and foreign journalists; however, there were no reports that any journalists have been denied accreditation.

Source: CIA – The World Factbook 2003; US State Department; Reporters without Borders

POPULATION & MORE FACTS

Population by age and sex

	All individuals		Male		Female	
	000	%	000	%	000	%
0-14	5,268	48	2,686	49	2,582	47
15-64	5,553	50	2,711	49	2,842	51
65+	238	2	126	2	112	2
Total	11,059	100	5,523	100	5,536	100

Source: CIA - The World Factbook 2003

	2003
Number of titles	
Total dailies	1
National dailies	1

Source: WAN from public sources

Top daily (2003)

Title	Publisher (language)
Le Sahel	Government (in French)

Source: WAN from public sources

NIGERIA

POPULATION

Population by age and sex

	All individuals		Households 000
	million	%	
0-15	56	48	16,000
16-24	20	17	
25-34	15	13	
35-44	11	9	
45-54	7	6	
55-64	4	3	
65+	4	3	
Total	117	100	

Source: ZenithOptimedia

Population by social class and sex

	All adults	
	million	%
A+B	3	5
C1	6	10
C2	9	15
D	22	36
E	21	34
Total	61	100

Source: ZenithOptimedia

AB=higher and intermediate managerial

C1=supervisory/clerical

C2=skilled manual

D=semi and unskilled manual

E=subsistence/inactive

NUMBER OF TITLES AND CIRCULATION & MORE FACTS

Top ten dailies (2001)

Title	Circulation (000)	Full page rate (Naira)	
		Mono	Colour
The Punch	100	130,000	160,000
Vanguard	60	90,000	120,000
Champion	50	92,000	126,500
New Nigerian	50	120,000	120,000
ThisDay	50	135,000	155,000
Sporting Champion	50	52,000	-
The Comet	45	87,000	134,590
Daily Trust	40	72,843	103,643
Daily Times	40	85,120	120,000
Nigerian Tribune	40	88,000	130,000

Source: ZenithOptimedia

Top ten advertising categories (2001)

Advertising sector
Communications
Tobacco
Electronics
Cars
Banking
Insurance
Property
Malt drinks
Carbonated drinks
Alcohol

Source: MC&A

Top ten advertisers (2001)

Advertiser
MTN
ECONET
Benson & Hedges
Rothmans
St. Moritz
Mercedes
Honda
Peugeot
Hyundai
IGNIS

Source: MC&A



ADVERTISING EXPENDITURE & ECONOMIC DATA

Main economic indicators 1996-2002

	1996	1997	1998	1999	2000	2001	2002
1 US\$= 120.58 Naira at 2002 rate							
Gross Domestic Product (Naira million)							
at current prices	2,824	2,940	2,881	3,322	4,903	5,703	5,928
% change	42.8	4.1	-2.0	15.3	47.6	16.3	3.9
at 2002 prices	5,157	4,962	4,408	4,850	6,251	6,436	5,928
% change	10.4	-3.8	-11.2	10.0	28.9	3.0	-7.9
Gross Domestic Product per capita (Naira)							
at current prices	28	28	27	30	43	49	51
at 2002 prices	52	47	41	44	54	55	51
Population							
Millions	99.2	105.0	107.9	110.9	115.2	116.9	116.9
Consumer Price Index							
2002=100	54.8	59.3	65.4	68.5	78.4	88.6	100.0
%change	29.3	8.2	10.3	4.8	14.5	13.0	12.9
Ad.spend as a % of GDP							
	0.09	0.09	0.12	0.14	0.13	0.11	-
Advertising Expenditure Growth (%)							
at current prices	35.3	-2.8	40.0	31.5	34.2	-1.8	-
at 2002 prices	4.7	-10.1	26.9	25.5	17.2	-13.0	-

Source: IFS, ZenithOptimedia

Advertising expenditure (Naira millions, in current prices)

	1995	1996	1997	1998	1999	2000	2001
Newspapers	304	411	-	-	300	400	3,000
Magazines	285	386	-	-	300	400	74
Television	456	617	-	-	2,162	2,480	2,000
Radio	399	540	-	-	1,150	1,550	292
Cinema	114	154	-	-	-	-	-
Outdoor	342	463	-	-	690	1,346	700
Total	1,900	2,571	2,500	3,500	4,602	6,176	6,066

Source: MMS, APCON, Mediafacts

Notes: After discounts, includes production, classified and agency commission

NIUE

General economic situation

GDP total US\$7.6 million; GDP per capita US\$3,800 (purchasing power parity; 2000). Consumer price index 101 (1995).

Performance of newspapers vs. other media

Both media and telecommunications services are provided by the government. Radio broadcasts are provided by radio Sunshine which focuses on the local population. Programs are broadcast six mornings, afternoons and evenings a week.

Cable television is also available.

Performance of different types of newspapers

The government published a weekly newspaper, *Tohi Tala Niue*, that closed down in 1992 after 40 years of publication. It was replaced in mid-1993 by the fortnightly *Niue Star*, a private sector publication.

Sources: CIA – *The World Factbook 2003*; *International Press Institute*

POPULATION

Population

	All individuals	
	000	%
Total	2	100

Source: CIA 2003

Commentary – The Norwegian Media Businesses' Association

The economy

Growth in the Norwegian economy is projected to pick up in 2004 and coming years, primarily fuelled by higher private consumption. Unemployment has stabilised. An economic turnaround has occurred, after a long period of high inflation. The low-inflation environment we have witnessed in Norway lately reflects global phenomena and trends. Globalisation, new technology and increased trade among countries are key forces affecting the Norwegian economy, in addition to exchange rate developments.

Low inflation has resulted in a considerable easing of monetary policy. The key interest rate has been reduced by a whopping 5.25 percentage points and is now approximately the same as among our trading partners. The krone has depreciated over the past year, and is in line with the average for the 1990s. The low interest rate has reduced household net interest expenses, and has increased household purchasing power considerably. Household demand will probably be the most important driving force in the Norwegian economy in the period ahead. Even with moderate wage settlements, real income growth may reach about 5%. In addition, improved labour market conditions will strengthen job security and lead to expectations of higher income growth.

Private consumption is projected to grow at 5.25% between

2003 and 2004; it should grow broadly in line with real income, with little change in the saving ratio.

Circulation

In 2003 circulation was down 1.4% from 2002. However, visitors to newspapers' websites in many cases more than compensated for the loss of readers for the printed editions.

Advertising

Advertising has been picking up somewhat since 2003, but some larger newspapers are still less than comfortable with ad volumes, especially classified ads. Many newspapers had a very good economic year in 2003, though, and are set to repeat that feat in 2004. The web will probably become a larger advertising medium than radio in 2004.

Media Ownership Act to be revised

The Acquisition of Newspaper and Broadcasting Enterprises Act (the Media Ownership Act for short) is to be revised in 2004. The Ministry of Culture and Church Affairs has proposed a set of changes, including raising the ownership threshold on the national level, establishing set levels for the regional level, introducing multi-media ownership levels nationally and regionally, removing ownership restrictions at local level, and the extension of the Act to embrace the electronic media. The proposal will probably be put before the Storting (Parliament) in May.

POPULATION

Population by age and sex (2002)

	All individuals		Male		Female		Households 000
	000	%	000	%	000	%	
Children	894	20	459	21	435	19	2,048
16-24	544	12	277	13	267	12	
25-34	684	15	348	16	336	15	
35-44	646	14	330	15	316	14	
45-54	611	14	312	14	299	13	
55-64	414	9	206	9	208	9	
65+	683	15	284	13	399	18	
Total	4,476	100	2,216	100	2,260	100	

Source: Statistics Norway

Households (2002)

Occupancy	Households 000
1 person	829
2 people	583
3 people	263
4 people	242
5 or more people	131
Total	2,048

Source: Statistics Norway

Age structure of readership (2002)

Age	% reach within age group
13-19	81
20-39	84
40-59	89
60+	87

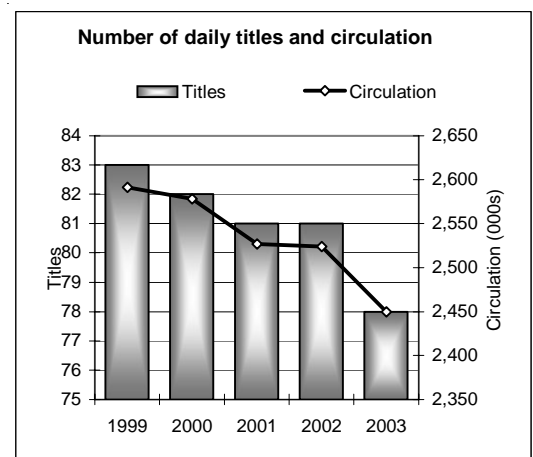
Newspaper reach 2002 (%)

	Daily
All adults	86
Men	87
Women	85

Source: Norsk Gallup Institutt

NUMBER OF TITLES AND CIRCULATION

	1999	2000	2001	2002	2003	Change (%)	
						99/2003	2002/03
Number of titles							
Total dailies	83	82	81	81	78	-6.02	-3.70
National dailies	8	8	8	8	8	0.00	0.00
Regional & local dailies	75	74	73	73	70	-6.67	-4.11
Non-dailies	74	72	71	77	84	13.51	9.09
National non-dailies	6	6	6	10	12	100.00	20.00
Regional & local non-dailies	68	66	65	67	72	5.88	7.46
Circulation (000)							
Total dailies	2,591	2,578	2,527	2,524	2,450	-5.44	-2.93
National dailies	730	721	737	736	718	-1.64	-2.45
Regional & local dailies	1,861	1,857	1,790	1,788	1,732	-6.93	-3.13
Non-dailies	374	365	370	395	441	17.91	11.65
National non-dailies	48	51	55	81	94	95.83	16.05
Regional & local non-dailies	326	314	315	314	347	6.44	10.51
Total annual sales (millions of copies)							
Dailies	768.9	761.9	750.3	743.2	718	-6.62	-3.39
National dailies	-	-	-	-	217	-	-
Regional & local dailies	-	-	-	-	501	-	-
Non-dailies	48.7	48.1	48.9	51.2	51	4.72	-0.39
National non-dailies	-	-	-	-	6	-	-
Regional & local non-dailies	-	-	-	-	45	-	-

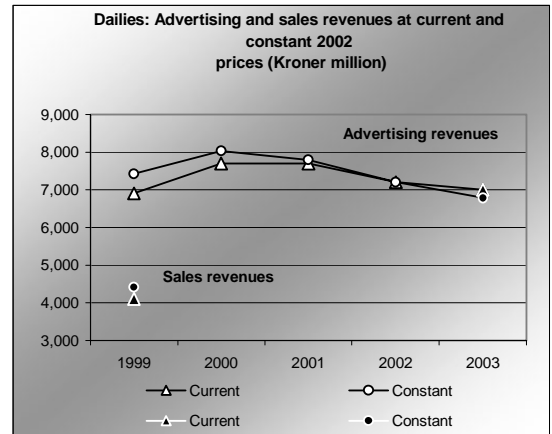




MORE FACTS

	1999	2000	2001	2002	2003	Change (%)	
						99/2003	2002/03
Advertising revenues (Kroner million)							
Dailies	6,900	7,700	7,700	7,200	7,010	1.59	-2.64
Dailies \$	7,421	8,037	7,800	7,200	6,793	-8.46	-5.66
Sales revenues (Kroner million)							
Dailies	4,104	-	-	-	7,000	70.57	-
Dailies \$	4,414	-	-	-	6,783	53.68	-

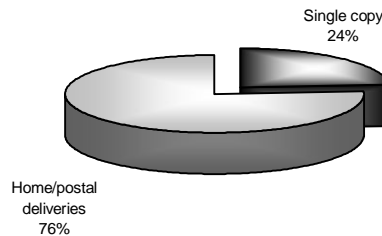
§ at constant 2002 prices
Before discounts. Typical discount - 19%



Type of newspaper sales (%)

	Single copy	Home/postal deliveries
1999	25	75
2000	25	75
2001	25	75
2002	24	76
2003	24	76

Type of newspaper sales in 2003 (%)



Media consumption (minutes per day)

	2000
Newspapers	49
Magazines	16
Radio	147
Television	200
Internet	15

Source: Norsk Gallup Institutt

Cover prices

	NKr
Single copy	8-15
Annual subscriptions	500-2,700

Top ten advertising categories (Jan-Oct 2002)

Advertising sector	% of display ad revenue
Information/national lottery	13
Auto	11
Office/computers/office equipment	8
Transport/travel	7
Books/magazines/education	4
Clothing/shoes	3
Building/construction	3
Insurance/finance	2
Everyday commodities	2
Audiovisual	2

Source: AC Nielsen

Top ten publishing companies (2002)

(ranked by total circulation)	
1	Aftenposten AS
2	Verdens Gang AS
3	AS Dagbladet
4	Bergens Tidende AS
5	Adresseavisen ASA
6	Stavanger Aftenblad ASA
7	Dagens Næringsliv AS
8	Drammens Tidende og BB AS
9	Fædrelandsvennen AS
10	Romerikes Blad

Top advertisers (2003)

Advertiser	Newspaper expenditure NKr (000)
Sparebank1-Gruppen	101,970
Expert	88,935
Steen & Strøm	74,783
Elkjøp	73,734
Coop Obs	71,714
Rema 1000	63,071
Steen Bertel O.	60,481
Telenor Mobil	60,465
Meny	52,203
Plantasjen	51,257

Source: Nielsen Media Research Jan-Dec 2003

Top ten dailies (2003)

Title	Publisher	Circulation (000)	Cover Price		Format	Full page rate (NKr)	
			NKr	US\$		Mono	Colour
VG	Verdens Gang AS	380	10	1.25	Tabloid	115,000	230,000
Aftenposten Morgen	Aftenposten AS	257	10	1.25	Broadsheet	135,000	209,000
Dagbladet	AS Dagbladet	186	10	1.25	Tabloid	-	128,875
Aftenposten Aften	Aftenposten AS	155	10	1.25	Tabloid	45,900	71,000
Bergens Tidende	Bergens Tidende AS	90	10	1.25	Broadsheet	44,400	80,400
Adresseavisen	Adresseavisen ASA	87	10	1.25	Broadsheet	45,750	73,940
Stavanger Aftenblad	Stavanger Aftenblad ASA	70	10	1.25	Broadsheet	33,940	51,860
Dagens Næringsliv	Dagens Næringsliv AS	69	15	1.88	Tabloid	78,500	110,000
Drammens Tidende	Drammens Tidende og BB AS	45	10	1.25	Broadsheet	36,813	54,813
Fædrelandsvennen	Fædrelandsvennen AS	45	10	1.25	Broadsheet	33,000	46,800

Online readership (page impressions/month)

Newspaper		2002	2003
VG	vg.no	77,808,000	120,048,000
Dagbladet	db.no	26,196,000	83,869,000
Aftenposten	aftenposten.no	26,554,000	33,401,000
Bergens Tidende	bt.no	8,687,000	7,828,000
Dagens Næringsliv	dn.no	8,505,000	8,146,000

Source: TNS Gallup (November 2003)

Newspaper colour capability & formats

Number of:	1999	2000	2001	2002	2003
4-colour newspapers	83	82	81	81	78
Broadsheets	17	17	17	18	8
Tabloids	65	64	63	63	70
Other	1	1	1	-	-

Employment

	1999	2000	2001	2002	2003
Total no. of Journalists	3,200	3,200	3,200	3,100	3,000
Total no. of Employees	9,700	9,700	9,600	9,400	9,000

Internet publishing (No. of online editions)

	1999	2000	2001	2002	2003
Dailies	51	73	72	81	78
Non-dailies	17	44	44	-	40*

* estimated



ADVERTISING EXPENDITURE & ECONOMIC DATA

Advertising expenditure	(Kroner million, in current prices)										
	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
Newspapers	4,710	5,054	5,278	5,384	5,557	5,641	5,930	5,930	6,000	6,200	6,300
Magazines	1,089	1,191	1,325	1,409	1,548	1,597	1,601	1,625	1,640	1,675	1,700
Television	2,734	3,065	3,413	3,779	4,630	4,572	4,458				
Radio	471	604	546	669	604	500	649				
Cinema	83	104	135	130	124	127	120				
Outdoor	213	190	188	257	263	249	375				
Internet	-	-	-	170	300	235	250				
Total	9,300	10,209	10,885	11,798	13,026	12,921	13,383	13,705	13,975	14,550	14,730

Source: 1996-2002 AC Nielsen, 2003-2006 ZenithOptimedia

Notes: Excludes agency commission, excludes production costs, excludes classified, before discounts

Main economic indicators 1996-2002

	1996	1997	1998	1999	2000	2001	2002
1 US\$=	7.98						
	Nkr at 2002 rate						
Gross Domestic Product (Nkr billion)							
at current prices	1,027	1,111	1,132	1,233	1,469	1,527	1,521
% change	10.6	8.2	1.9	8.9	19.1	3.9	-0.4
at 2002 prices	1,185	1,250	1,246	1,326	1,533	1,546	1,521
% change	9.2	5.5	-0.3	6.4	15.6	0.9	-1.7
Gross Domestic Product per capita (Nkr 000)							
at current prices	234.5	252.0	255.6	276.5	327.2	338.5	337.2
at 2002 prices	270.6	283.5	281.3	297.3	341.5	342.9	337.2
Population							
Millions	4.4	4.4	4.4	4.5	4.5	4.5	4.5
Consumer Price Index							
2002=100	86.7	88.9	90.8	93.0	95.8	98.7	100.0
% change	1.3	2.6	2.2	2.4	3.0	3.0	1.3
Ad.spend as a % of GDP							
	0.91	0.92	0.96	0.96	0.89	0.85	0.88
Advertising Expenditure Growth (%)							
at current prices	18.9	9.8	6.6	8.4	10.4	-0.8	3.6
at 2002 prices	17.3	7.0	4.3	5.9	7.2	-3.7	2.2

Source: IFS, ZenithOptimedia

Research

Circulation is audited by: Norsk Opplagskontroll AS

Readership is measured by: TNS Gallup

Methodology: Daily telephone interviews of a sample size of 29,050 per year. Interviewing method used: FRY (First Read Yesterday).

Taxes

VAT on: sales 0 advertising 24%
 newsprint 24% plant 24%
 composition 24% (standard VAT rate 24%)

Newspaper publishers are subject to the same tax on profits as other companies.

Subsidies

Are there any direct subsidies? Grants are given to newspapers that circulate less than 6,000 and appear more than once a week, and to newspapers appearing more than three times a week with larger competitors in the same city. The grants are based on circulation, frequency and competition structure, and totalled Nkr 180 million in 2001. Newspapers with annual profits above Nkr 2 million, or Nkr 6 million over the last three years, are no longer eligible for subsidies.

	1997	1998	1999	2000	2001
Kroner million	202	188	159	164	180

Discounts

on: post 0 rail 0 telephone 0 telegraph 0 telex 0

Ownership

Does any law exist governing publishing-house ownership, or the registration of shares in newspaper-publishing companies? An act to regulate media ownership concentration was introduced in 1997. There are no definite limits to ownership, but one third of national circulation is to be used as a yardstick.

Is there any law prohibiting or restricting foreign companies or individuals from owning shares, and in particular, the majority of shares, of domestic daily newspapers? There is no limit to foreign ownership of stock companies.

Is there any law prohibiting daily newspaper or periodical publishers from operating radio or television stations in the same locality? The statute mentioned above regulates media ownership.

So as to guarantee disclosure and transparency in the capital structure and to avert silent partnerships, is there a law or rule making it possible to determine who actually owns a publishing company? The Central Registration Office ensures transparency.

Is there an antitrust law limiting concentration in the daily press? Yes, the statute mentioned above.

Is further regulation of media concentration expected? No

POPULATION & MORE FACTS

Population by age and sex

	All individuals		Male		Female		Households 000
	000	%	000	%	000	%	
0-14	1,136	42	579	38	557	47	290
15-64	1,512	56	914	60	598	50	
65+	65	2	35	2	30	3	
Total	2,713	100	1,528	100	1,185	100	

Source: CIA

Top dailies (2001)

Title	Circulation (000)	Readership (000)	Full page rate (US\$)	
			Mono	Colour
Al Watan	34	133	4,165	8,330
Oman Daily	26	154	4,165	8,330
Al Shabiba	19	114	4,165	8,330
Oman Daily Observer	18	114	4,165	8,330
Times of Oman	14	27	4,165	8,330

Source: ZenithOptimedia

Top ten advertising categories (2001)

Advertising sector	Newspaper expenditure US\$ (000)
Road vehicles	9,104
Financial services	3,095
Entertainment	1,856
Retail stores	1,794
Publishing/media	1,324
Government	1,219
Professional services	791
Travel	751
Office equipment & accessories	703
Restaurants/hotels/clubs	616

Source: PARC

Top ten advertisers (2001)

Advertiser	Newspaper expenditure US\$ (000)
Toyota	2,546
Daewoo	810
Hyundai	759
Oman Int'l Bank	742
Nissan	730
Muscat Festival	721
Bank Muscat	607
Classifieds	595
Salalah	508
KIA	465

Source: PARC

ADVERTISING EXPENDITURE & ECONOMIC DATA

Main economic indicators 1996-2002

	1996	1997	1998	1999	2000	2001	2002
1 US\$=	0.39						
	Rials at 2002 rate						
Gross Domestic Product (Rials million)							
at current prices	5,874	6,090	5,416	6,041	7,639	7,668	-
% change	10.7	3.7	-11.1	11.5	26.5	0.4	-
at 2002 prices	5,692	5,896	5,285	5,872	7,507	7,613	-
% change	10.6	3.6	-10.4	11.1	27.9	1.4	-
Gross Domestic Product per capita (Rials)							
at current prices	2,658	2,695	2,365	2,456	3,183	3,130	-
at 2002 prices	2,576	2,609	2,308	2,387	3,128	3,107	-
Population							
Millions	2.2	2.3	2.3	2.5	2.4	2.5	2.5
Consumer Price Index							
2002=100	103.2	103.3	102.5	102.9	101.8	100.7	100.0
%change	0.1	0.1	-0.8	0.4	-1.1	-1.0	-0.7
Ad.spend as a % of GDP							
	0.15	0.17	0.21	0.17	0.14	0.16	-
Advertising Expenditure Growth (%)							
at current prices	10.0	15.8	9.3	-8.5	1.5	16.7	-
at 2002 prices	9.9	15.7	10.2	-8.9	2.6	17.9	-

Source: IFS, ZenithOptimedia

Advertising expenditure (US\$ millions, in current prices)

	1995	1996	1997	1998	1999	2000	2001
Newspapers	13.3	16.1	17.6	20.7	20.9	22.9	24.6
Magazines	0.9	0.6	0.8	0.7	0.5	0.4	1.6
Television	7.2	6.9	8.9	8.4	5.9	4.4	6.2
Total	21.4	23.6	27.3	29.9	27.3	27.7	32.3

Source: PARC

Notes: Before discounts, includes agency commission, excludes classified and production costs

PAKISTAN

Due to a lack of available data, the majority of charts in this entry have not been updated since the 2002 edition of World Press Trends. Those that have not been updated clearly state the year to which the data relates.

POPULATION

Population by age and sex (1999/2000)

	All individuals		Male		Female		Households 000
	000	%	000	%	000	%	
0-14	59,375	43	30,764	43	28,611	43	20,293
15-24	26,629	19	13,522	19	13,107	20	
25-34	19,058	14	10,016	14	9,042	14	
35-44	12,713	9	6,602	9	6,111	9	
45-54	9,249	7	4,790	7	4,459	7	
55-64	5,734	4	3,077	4	2,657	4	
65+	4,712	3	2,575	4	2,137	3	
Total	137,469	100	71,346	100	66,123	100	

Source: Economic survey 1999/2000

Population by social class and sex (2000)

	All adults		Male		Female	
	000	%	000	%	000	%
A	5,895	7	3,071	7	2,824	7
B	6,737	8	3,511	8	3,226	8
C	37,896	45	19,745	45	18,151	45
D	33,685	40	17,551	40	16,134	40
Total	84,213	100	43,877	100	40,335	100

Source: Federal Bureau of Statistics

Monthly income (Rupees):

A= over 15,000

B= 7,001-15,000

C= 3,000-7,000

D= under 3,000

Newspaper readership in 1999 (%)

Age	Regular readers	Occasional readers	All readers	Per month
All adults	18.5	20.4	38.9	47.0

Source: Gallup/BRB

Regular = 3 or 4 issues out of 4

Occasional = 1 or 2 issues out of 4

Daily readership by section in 1999 (%)

Section	%
Front page	15.6
Back page	12.1
Page 2	10.5
International	9.0
Sports	8.6
Films	7.4
Classified	5.8
Business	5.5

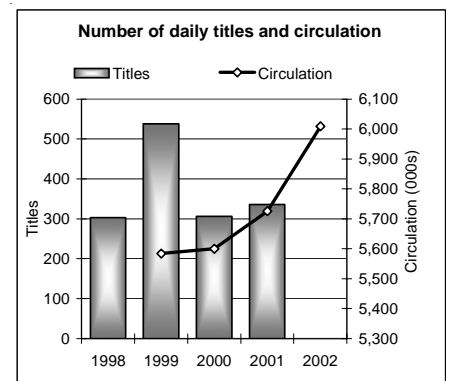
Source: Gallup/BRB

NUMBER OF TITLES AND CIRCULATION

	1998	1999	2000	2001	2002	Change (%)	
						98/2001	2000/01
Number of titles							
Total dailies	303	538	306	336	-	10.89	9.80
Non-dailies	247	2,604	1,221	1,190	-	381.78	-2.54
Circulation (000)							
Total dailies	-	5,584	5,600	5,726	6,009	7.61	4.94
Non-dailies	-	1,727	1,759	1,863	1,967	13.90	5.58

Source: Government of Pakistan

* change 99/2002 and 2001/02



MORE FACTS

Top ten dailies (2001)

Title	Circulation (000)	Readership (000)	Full page rate (Rs)	
			Mono	Colour*
Jang	775	3,875	734,400	1,728,000
Khabrain	345	1,380	378,000	928,800
Nawa-e-Waqt	295	1,475	367,200	550,800
Pakistan	125	375	302,400	437,400
Dawn	125	375	518,400	950,400
Awam	110	440	259,200	540,000
The News	105	315	427,680	748,440
Express	87	261	168,480	129,600
Qaumi Akhbar	80	320	185,760	-
Mashreq	55	165	151,200	630,720

Source: ZenithOptimedia

* 2000 price

**Top ten advertisers (2000)****Advertiser**

Mobilink
Dewan Farooq Motors
International Watch Company
Unilever
Paktel
Raja Motor Company
Citibank
Indus Motor Company
Nestlé
Pakistan Tobacco

Source: ZenithOptimedia

Top ten product categories (2000)**Category**

Education
Durables
Clothing & footwear
Telecommunications
FMCGs
Financial services
Toiletries
Auto
Publishing, printing, etc
Health

Source: ZenithOptimedia

ADVERTISING EXPENDITURE & ECONOMIC DATA**Main economic indicators 1996-2002**

	1996	1997	1998	1999	2000	2001	2002
1 US\$=	59.72						
	Rupees at 2002 rate						
Gross Domestic Product (Rupees billion)							
at current prices	2,120	2,428	2,678	2,938	3,147	3,416	3,727
% change	13.6	14.5	10.3	9.7	7.1	8.6	9.1
at 2002 prices	2,757	2,836	2,942	3,100	3,147	3,553	3,727
% change	3.0	2.9	3.8	5.4	1.5	12.9	4.9
Gross Domestic Product per capita (Rupees 000)							
at current prices	15.8	17.6	20.4	21.8	22.9	23.6	25.7
at 2002 prices	20.6	20.5	22.4	23.0	22.9	24.5	25.7
Population							
Millions	134.2	138.2	131.5	134.5	137.5	145.0	145.0
Consumer Price Index							
2002=100	76.9	85.6	91.0	94.8	100.0	96.1	100.0
%change	10.4	11.4	6.3	4.1	5.5	0.8	4.0
Ad.spend as a % of GDP							
	0.24	0.25	0.21	0.21	0.21	0.21	0.20
Advertising Expenditure Growth (%)							
at current prices	19.2	17.4	-4.8	9.1	3.8	9.6	7.5
at 2002 prices	8.0	5.4	-10.5	4.7	-1.6	8.7	3.4

Source: IFS, ZenithOptimedia

Advertising expenditure

(Rupees millions, in current prices)

	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
Newspapers	1,736	1,962	1,368	1,430	2,370	2,484	2,550	2,686	2,872	3,079	3,233
Magazines	506	576	375	390	630	656	674	710	759	847	907
Television	2,420	2,958	3,401	3,738	2,875	3,264	3,633				
Radio	151	169	119	123	173	190	207				
Cinema	13	18	28	29	30	33	37				
Outdoor	299	331	431	531	400	470	529				
Total	5,125	6,014	5,723	6,242	6,480	7,099	7,632	8,373	9,293	10,455	11,349

Source: 1996-2000 IAL/PTV, Gallup Adtrack, ZenithOptimedia 2001-2006 ZenithOptimedia

Notes: Excludes production costs, includes agency commission and classifieds, after discounts.

Research

Circulation is audited by: Audit Bureau of Circulations (ABC)

PALAU

General economic situation

GDP total US\$174 million (2001; including US subsidy); GDP per capita US\$8,700 (purchasing power parity; 2001). Consumer price index 103.4 (2000).

Performance of newspapers vs. other media

There are a total of four radio stations in Palau: two privately owned, one Chinese-owned Christian religious broadcaster, and one government station. Palau National Communications Corporation (PNCC) is Palau's only provider of telephone, Internet and television services. 95% of Palau households have cable television through a fibre optic network covering the major islands of the country, Koror, Babeldaob, and Peleliu. No local or regional television is broadcast in Palau. Cable programming consists of six USA mainland channels broadcast through videotape with a six-day delay as well as real-time satellite channels such as CNN, Cartoon Network, ESPN and others. Island Cable Television (ICTV), a division of PNCC and the only cable provider in Palau, does include a teletext channel featuring announcements, advertisements, etc. for which advertisers pay US\$5 per screen per day with discounts for longer-term

advertisements. ICTV has the capacity to produce local videos on a contractual basis.

Performance of different types of newspapers

There are no daily newspapers published in Palau. The print media consist of a government gazette and three independent weekly newspapers. Two of them, *Tia Belau* in English and *Roureur Belau* in Palauan are published by MYU Publications. The circulation of *Tia Belau* is 1,500 to 2,000 copies, and the price of a single copy is US\$0.65; a copy of *Roureur Belau* costs US\$0.25. The third weekly newspaper, *Palau Horizon*, is published in English by Island's Horizon Corporation. Its circulation is 1,500 copies, of which 1,200 are circulated in Palau, and the remainder in Saipan and Guam. The price of a *Palau Horizon* copy is US\$0.50.

Newspapers published outside Palau and read in Palau include two daily newspapers, *Marianas Variety* (published in Northern Marianas), and *Pacific Daily News* (published in Guam).

Source: CIA – *The World Factbook 2003*; Freedom House; UNESCO

POPULATION & MORE FACTS

Population by age and sex

	All individuals		Male		Female	
	000	%	000	%	000	%
0-14	5	25	3	27	2	22
15-64	13	65	7	64	6	67
65+	2	10	1	9	1	11
Total	20	100	11	100	9	100

Source: CIA – *The World Factbook 2003*

	2002
Number of titles	
Non-dailies	3

Source: WAN from public sources

PALESTINIAN AUTHORITY

Performance of newspapers vs. other media

Since the start of the second Intifada (uprising) both the official and private-sector media have been at the service of Palestinian Authority propaganda. Television is the key medium for news and information in the Palestinian areas. Satellite dishes are common, and pan-Arab broadcasters, particularly Qatar's Al-Jazeera TV, are popular among viewers. The official radio and TV stations of the Palestinian National Authority operate alongside dozens of private radio stations and a handful of private TV stations. The official outlets garner few viewers among Palestinians, who prefer local news from the popular Al-Jazeera, Abu-Dhabi TV, or even Lebanese Hezbollah's Al/Manar TV. Jordanian TV is widely-watched in the West Bank. Palestinian media outlets were badly damaged by Israeli military operations in the wake of the second Intifada. Radio and TV stations were destroyed, including, in January 2002, the premises of the Palestinian National Authority's TV and radio stations in Ramallah.

Performance of different types of newspapers

Two of the three main daily newspapers – *Al-Ayyam* and *Al Hayat al-Jadida* – have direct or indirect relations with the Palestinian National Authority (PNA) and its officials, either because the editor is an aide to Arafat or because the PNA finances the paper's payroll. The third main daily, *Al-Quds*, is privately owned but avoids criticizing the PNA.

Newspaper launches/closures

The security services have regularly shut down media outlets,

banned publication or broadcast of material. In January 2002, Palestinian security authorities in the West Bank city of Hebron closed the weekly newspaper *Akhbar al-Khalil* without explanation. Newspaper staff alleged that the Palestinian National Authority was responding to Israeli and U.S. pressure to shutter the publication, which frequently criticized those countries' Middle East policies. In an effort to crack down on militants, in late 2001, authorities closed the opposition Islamist weeklies *Al-Risala* and *Al-Istiqlal* – Gaza based publications affiliated with the Khalas Party.

Media/Press Laws

In 2002, the Palestinian Journalists' Union and the Palestinian Journalists' Syndicate imposed a ban on the use of photographs depicting armed children and masked men. The ban was extended to foreign photographers. Under a 1995 Palestinian press law, journalists may be fined and jailed and newspapers closed for publishing 'secret information' on Palestinian security forces, or news that might harm national unity or incite violence. However, another press law, also signed in 1995, stipulates that Palestinian intelligence services do not reserve the right to interrogate, detain, or arrest journalists on the basis of their work.

In 2002, the daily *Al-Quds* was required to submit its entire contents, including advertising, to the military censor by 4 p.m. each day.

Sources: Freedom House; Reporters Without Borders; BBC News; Committee to Protect Journalists; US State Department



POPULATION

	1999	2000	2001	2002	Change (%)	
					99/2002	2000/02
Number of titles						
Total dailies	3	3	-	3	0.00	0.00
Non-dailies	10	13	-	-	30.00 *	-
Circulation (000)						
Total dailies	-	-	-	-	-	-
Non-dailies	1,617	2,058	-	-	27.27 *	-

Source: UNESCO, WAN

* change refers to 99/2000

Top dailies (2002)

Title
Al-Quds
Al-Ayyam
Al Hayat al-Jadida

Source: WAN

PANAMA

POPULATION

Population by age and sex

	All individuals		Male		Female		Households 000
	000	%	000	%	000	%	
0-15	920	32	469	32	451	32	699
16-24	525	18	264	18	261	18	
25-34	471	16	236	16	235	16	
35-44	366	13	184	13	182	13	
45-54	253	9	128	9	125	9	
55-64	165	6	84	6	81	6	
65+	176	6	84	6	92	6	
Total	2,876	100	1,449	100	1,427	100	

Source: Contraloria de la República/CIA

Household status

	Households	
	000	%
AB	28	4
C1	138	20
C2	163	24
D	173	25
E	184	27
Total	687	100

Source: Contraloria de la República

AB=higher and intermediate managerial

C1=supervisory/clerical

C2=skilled manual

D=semi and unskilled manual

E=subsistence/inactive

Top ten advertisers (2001)

Advertiser	Newspaper expenditure US\$ (000)
BellSouth	1,633
Cable & Wireless	1,579
Caja de Seguro Social	1,053
Corp. Medcom	857
Fotokina	807
Cuernavaca Business	774
Audio Foto International	574
Raenco International	564
Multitek International	543
Mueb. Casa Confort	504

Source: Controles de Inversión Publicitaria

Top dailies (2002)

Title	Circulation (000)	Adult readership (000)	Full page rate (US\$)	
			Mono	Colour
Critica	60	180	836	1,100
Prensa	39	117	1,449	1,827
El Siglo	35	105	660	836
El Universal	22	66	638	750
Panama America	17	51	819	1,071
La Estrella De Panama	8	24	504	630

Source: ZenithOptimedia

ADVERTISING EXPENDITURE & ECONOMIC DATA

Main economic indicators 1996-2002

	1996	1997	1998	1999	2000	2001	2002
1 US\$= 1.00 Balboa at 2002 rate							
Gross Domestic Product (Balboa billion)							
at current prices	9	9	10	11	11	11	11
% change	12.9	6.2	7.9	3.1	4.0	0.7	1.8
at 2002 prices	9	10	11	11	11	11	11
% change	11.4	4.9	7.3	1.8	2.5	0.4	0.8
Gross Domestic Product per capita (Balboa 000)							
at current prices	3.3	3.5	3.7	3.8	3.9	3.9	3.9
at 2002 prices	3.5	3.6	3.9	3.9	4.0	3.9	3.9
Population							
Millions	2.7	2.7	2.8	2.8	2.8	2.9	2.9
Consumer Price Index							
2002=100	94.4	95.6	96.1	97.3	98.7	99.0	100.0
% change	1.3	1.3	0.5	1.3	1.4	0.3	1.0
Ad.spend as a % of GDP							
	1.51	1.42	1.50	1.70	1.58	1.38	1.24
Advertising Expenditure Growth (%)							
at current prices	18.3	-0.2	13.6	17.1	-3.3	-12.0	-8.9
at 2002 prices	16.8	-1.4	13.0	15.6	-4.7	-12.3	-9.8

Source: IFS, ZenithOptimedia

Advertising expenditure

(Balboa million, in current prices)

	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
Newspapers	43	47	52	62	58	50	49	50	55	59	64
Television	87	81	94	109	105	95	83				
Radio	5	6	7	9	10	7	7				
Total	135	135	153	179	173	153	139	153	182	204	225

Source: Controles de Inversión Publicitaria

Notes: Includes classified advertising and agency commission, excludes production costs. Before discounts.

PAPUA NEW GUINEA

General economic situation

GDP total US\$10.86 billion; GDP per capita US\$2,051 (purchasing power parity; 2002). Consumer price index 109.8 (2002).

Performance of newspapers vs. other media

Radio is a key source of information, given the country's low literacy rate and many isolated villages. The government-owned National Broadcasting Corporation operated two radio networks whose effectiveness was limited by inadequate funding and deteriorating equipment. The private NAU-FM network serves the capital of Port Moresby and provincial capitals. There are local radio stations in cities other than Port Moresby. The television broadcasting company, EMTV, is government controlled; however, two cable companies are

independent. Television reception was limited mostly to the capital and provincial centres.

Newspaper launches/closures

The two daily English-language newspapers are foreign owned. In 2002 their combined circulation was less than 60,000. Two weekly newspapers – one in English and one in Melanesian Pidgin (the national lingua franca) – were also published.

Press council

The Papua New Guinea Media Council is comprised of nine members, six are media outlets and three are media and advertising agencies.

Source: Freedom Forum; Australian Press Council; BBC News

POPULATION & MORE FACTS

Population by age and sex

	All individuals		Male		Female	
	000	%	000	%	000	%
0-14	2,035	38	1,034	38	1,001	39
15-64	3,062	58	1,583	58	1,479	57
65+	199	4	94	3	105	4
Total	5,296	100	2,711	100	2,585	100

Source: CIA - The World Factbook 2003

	2002
Number of titles	
Total dailies	2
National dailies	2

Source: WAN from public sources

Top dailies (2002)

Title	Publisher	Circulation (000)
Papua New Guinea Post-Courier	South Pacific Post Limited	26
The National	Pacific Star Limited	-

Source: PANPA Yearbook 2004; WAN from public sources

PARAGUAY

General economic situation

GDP total US\$25.19 billion; GDP per capita US\$4,173 (purchasing power parity; 2002). Consumer price index 110.5 (2002).

Performance of newspapers vs. other media

Although the print and electronic media are largely privately owned, many media outlets are tied closely to the Colorado Party, the opposition Liberal Party, or business entities. The economic situation in the country accentuates media dependency on political parties and big businesses for funding. Because of the economic crisis, foreign investors have bought some television stations, dropping news programmes and replacing them with entertainment. Nonetheless, the broadcast media – particularly radio, which includes community stations – remain more diverse than other media.

Performance of different types of newspapers

There are four major daily newspapers: *ABC Color*, *La Nacion*, *Noticias*, and *Ultima Hora*.

Circulation

According to surveys by civil-society organisations, only about 8% of Paraguayans believe that the press is trustworthy. This public cynicism, combined with a recession, has drastically reduced circulation at most daily newspapers.

Ownership

Non-governmental media ownership is highly concentrated.

Media/press laws

A law that made access to public records more difficult was

eventually repealed.

Law 1682, dealing with access to private records and banning or restricting publication of 'sensitive material' about people came into force in July 2002. Information about people's 'wealth, solvency or credit ranking' cannot be divulged without their permission. The media regard the law as a 'self-defence law' for politicians.

Sources: CIA - The World Factbook 2003; Freedom House; Reporters Without Borders; Committee to Protect Journalists; WAN from public sources

POPULATION & MORE FACTS

Population by age and sex

	All individuals		Male		Female	
	000	%	000	%	000	%
0-14	2,320	38	1,179	39	1,141	38
15-64	3,430	57	1,722	57	1,708	57
65+	287	5	132	4	155	5
Total	6,037	100	3,033	100	3,004	100

Source: CIA - The World Factbook 2003

Top dailies (2002)

Title
ABC Color
La Nacion
Noticias
Ultima Hora

Source: WAN from public sources

Due to a lack of available data, the majority of charts in this entry have not been updated since the 2002 edition of World Press Trends. Those that have not been updated clearly state the year to which the data relates.

POPULATION

Population by age and sex (2000)

	All individuals		Male		Female	
	000	%	000	%	000	%
0-15	8,553	34	4,344	35	4,209	33
16-24	5,175	21	2,605	21	2,570	20
25-34	4,052	16	1,985	16	2,067	16
35-44	2,938	12	1,418	11	1,520	12
45-54	1,994	8	973	8	1,021	8
55-64	1,329	5	645	5	684	5
65+	1,193	5	546	4	647	5
Total	25,234	100	12,516	100	12,718	100

Source: INEI

Population status (2000)

	All individuals	
	000	%
A	268	1
B	2,337	9
C	7,949	32
D	14,679	58
Total	25,231	100

Source: INEI

A= High/higher-middle class

B= Middle/middle-lower class

C= Lower class

D= Subsistence/inactive

Newspaper reach in Lima (%) 2000

	Weekly
All adults (15+)	35.8
Men	42.0
Women	29.5

Source: CPI

NUMBER OF TITLES AND CIRCULATION

	1998
Number of titles	
Total dailies	57
National dailies	20
Regional dailies	10
Local dailies	27
Non-dailies	4
National non-dailies	1
Regional non-dailies	2
Local non-dailies	1
Circulation (000)	
Total dailies	5,700

MORE FACTS

Top ten dailies (2001)

Title	Circulation (000)	Readership (000) *	Full page rate (US\$)	
			Mono	Colour
Correo	203	214	4,154	6,647
El Popular	180	124	2,374	2,374
El Comercio	177	483	6,980	9,972
Ojo	158	205	4,154	6,647
La República	130	154	4,838	8,224
Aja	123	290	3,316	5,305
El Chino	120	133	2,245	3,592
Libero	120	117	2,374	2,374
Todo Sport	100	106	2,150	3,440
El Bocón	73	127	3,316	5,305

Source: CPI

* in Lima only

Top ten advertising categories (2001)

Advertising sector	Newspaper expenditure US\$ (000)
Mobile telecoms	7,145
Politics	6,484
Universities	5,217
Banks	5,007
Retail	4,141
Higher education	3,843
Other	2,998
Telecoms	2,646
Services & institutions	2,321
Radio	1,856

Source: Media Check

Top ten advertisers (2001)

Advertiser	Newspaper expenditure US\$ (000)
Tim	2,973
Saga Falabella	2,793
Telefónica	2,224
Movistar	1,967
Sunat	1,965
Banco de Credito	1,723
Banco de la Nación	1,169
Cadena Peruana de Noticias	1,125
Bellsouth	1,112
E Wong	903

Source: Media Check



ADVERTISING EXPENDITURE & ECONOMIC DATA

Main economic indicators 1996-2002

	1996	1997	1998	1999	2000	2001	2002
1 US\$=	3.52	Nuevo Soles at 2002 rate					
Gross Domestic Product (Nuevo Soles billion)							
at current prices	137	157	167	175	187	190	200
% change	13.3	14.9	5.9	4.9	6.9	1.8	5.2
at 2002 prices	175	185	183	185	191	190	200
% change	1.6	5.8	-1.3	1.4	3.1	-0.2	5.1
Gross Domestic Product per capita (Nuevo Soles 000)							
at current prices	5.7	6.5	6.7	6.9	7.3	7.2	7.6
at 2002 prices	7.3	7.6	7.4	7.3	7.4	7.2	7.6
Population							
Millions	24.0	24.4	24.8	25.2	25.7	26.4	26.4
Consumer Price Index							
2002=100	78.3	85.0	91.2	94.4	97.9	99.9	100.0
% change	11.5	8.6	7.3	3.5	3.7	3.7	3.7
Ad.spend as a % of GDP							
	-	0.57	0.52	0.45	0.37	0.34	0.31
Advertising Expenditure Growth (%)							
at current prices	-	-	-3.5	-8.5	-12.3	-6.6	-4.0
at 2002 prices	-	-	-10.0	-11.6	-15.5	-8.5	-4.2

Source: IFS, ZenithOptimedia

Advertising expenditure

(Nuevo Soles millions, in current prices)

	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
Newspapers	285	275	254	230	203	185	189	196	200	215
Magazines	24	23	20	17	15	14	15	15	16	17
Television	440	396	345	297	277	276				
Radio	75	73	85	77	77	74				
Outdoor	69	94	85	70	72	70				
Total	892	861	788	691	645	619	642	673	700	754

Source: 1997-2002 CPI, SME 2003-2006 ZenithOptimedia

Notes: After discounts, includes classified

Due to a lack of available data, the majority of charts in this entry have not been updated since the 2002 edition of World Press Trends. Those that have not been updated clearly state the year to which the data relates.

POPULATION

Population by age and sex (2000)

	All individuals		Male		Female		Households 000
	000	%	000	%	000	%	
Children	27,308	37	13,927	37	13,381	36	14,626
15-24	14,775	20	7,550	20	7,225	19	
25-34	11,654	16	5,868	16	5,786	16	
35-44	8,638	12	4,172	11	4,466	12	
45-54	5,865	8	2,912	8	2,953	8	
55-64	3,602	5	1,765	5	1,837	5	
65+	2,880	4	1,306	3	1,574	4	
Total	74,723	100	37,501	100	37,223	100	

Source: Technical Advisory Group & NSC Population Projections Unit

Population status (2000)

	All individuals	
	000	%
AB	2,989	4
C	14,198	19
D	34,378	46
E	23,159	31
Total	74,723	100

Source: 1995 Census of Population, NSO, projected to 2000

AB = professionals, owners of big businesses and farms, senior executives
 C = minor professionals, owners of small businesses and farms, junior executives, white collar workers
 D = tenant farmers, skilled workers, foremen
 E = farmhands, unskilled workers, vendors, unemployed

NUMBER OF TITLES AND CIRCULATION

	1997
Number of titles	
Total dailies	42
National dailies	31
Regional dailies	11
Regional non-dailies	47
Regional Sundays	15
Circulation (000)	
Total dailies	4,711
National dailies	4,542
Regional dailies	169
Regional non-dailies	199
Regional Sundays	67

MORE FACTS

Top advertising categories (2001)

Advertising sector

- Communication
- Office equipment
- Finance
- Retail
- Entertainment
- Auto
- Education
- Travel
- Institutional ads
- Hotels, restaurants & clubs

Source: AC Nielsen

Top ten advertisers (2001)

Advertiser

- Smart Communications
- Globe Telecom
- Shoemart
- PLDT
- Philippine Telephone Corporation
- Ayala Land
- Union Bank Of Switzerland
- Nestlé
- Toyota
- Oracle Corporation

Source: AC Nielsen

Top publishing companies (2001)

- Phil. Daily Inquirer
- Philippine Star
- Manila Bulletin
- Asian Wall S Journal
- Business World
- People's Journal
- Computerworld Phil.
- World News
- Manila Standard
- People's Journal T.

Source: AC Nielsen



Top ten dailies (1999)

Title	Circulation (000)	Readership (000) *	Cover Price		Format	Full page rate (Peso)	
			Peso	US\$		Mono	Colour
Abante	417	1,926	5.00	0.10	Tabloid	33,600	60,480
People's Journal	382	684	5.00	0.10	Tabloid	42,735	55,556
People's Tonight	366	445	-	-	-	36,960	-
Remate	295	368	5.00	0.10	Tabloid	-	-
Philippine Daily Inquirer	257	1,934	12.00	0.23	Broadsheet	107,325	193,185
Philippine Star	251	843	10.00	0.19	Broadsheet	105,300	189,540
Manila Bulletin	250	1,460	10.00	0.19	Broadsheet	95,400	171,720
Tempo	250	590	5.00	0.10	Tabloid	30,240	39,312
Taliba	228	-	5.00	0.10	Tabloid	20,530	-
Manila Times	209	244	10.00	0.19	Broadsheet	89,910	161,838

Source: Philippine Media Audit Council (PMAC)

* in 2001

ADVERTISING EXPENDITURE & ECONOMIC DATA

Main economic indicators 1996-2002

	1996	1997	1998	1999	2000	2001	2002
1 US\$=	51.60	Pesos at 2002 rate					
Gross Domestic Product (Pesos billion)							
at current prices	2,172	2,427	2,665	2,977	3,308	3,674	4,023
% change	14.0	11.7	9.8	11.7	11.1	11.0	9.5
at 2002 prices	3,073	3,243	3,247	3,399	3,619	3,788	4,023
% change	4.5	5.5	0.1	4.7	6.5	4.7	6.2
Gross Domestic Product per capita (Pesos 000)							
at current prices	30.2	33.0	35.5	39.8	43.3	47.6	52.2
at 2002 prices	42.7	44.1	43.2	45.5	47.4	49.1	52.2
Population							
Millions	71.9	73.5	75.2	74.8	76.3	77.1	77.1
Consumer Price Index							
2002=100	70.7	74.8	82.1	87.6	91.4	97.0	100.0
%change	9.0	5.9	9.7	6.7	4.4	6.1	3.1
Ad.spend as a % of GDP							
	0.79	0.66	0.61	0.63	0.65	0.63	0.61
Advertising Expenditure Growth (%)							
at current prices	28.5	-7.0	1.1	15.0	15.3	8.6	5.0
at 2002 prices	17.9	-12.1	-7.8	7.8	10.5	2.3	1.8

Source: IFS, ZenithOptimedia

Advertising expenditure

(Pesos millions, in current prices)

	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
Print	4,822	2,688	2,500	2,812	3,182	3,495	3,670	4,200	4,830	5,410	5,951
Television	9,320	9,872	10,100	11,648	13,437	14,346	15,168	18,505	21,281	23,835	26,695
Radio	2,736	2,640	2,700	3,113	3,607	4,022	4,159				
Other	322	800	880	1,034	1,233	1,437	1,468				
Total	17,200	16,000	16,180	18,607	21,458	23,300	24,465	28,613	32,904	36,852	41,013

Source: 1996 Fookien Times Yearbook, 1997-1999 Ad Board of the Philippines
2000-2006 ZenithOptimedia

Notes: Includes classified advertising (est. at 15% of the total), and agency commission (15%), excludes production costs, after discounts

Research

Newspaper circulations were first audited in 1989 by the Print Media Audit Council (PMAC). The Council only ever conducted fifteen audits over eight years, and no audit has been conducted for the last six years. Some publications still use figures from the last audit as their official circulations, other circulation figures are simply claims made by

individual publishers. Some parties plan to revive the audit process.

Readership information is produced by:

1. Social weather station
2. Asia Research Gallup
3. AC Nielsen

Commentary - Polish Chamber of Press Publishers

In 2003 signs appeared that Poland is finally emerging from its economic stagnation. The most important were the growth in exports and in industrial production, the driving force of the economy. The government allowed the central bank to reduce its obligatory reserves, which means the bank can issue more credit.

Inflation was very low at the beginning of the year at just 0.5% at an annual rate, but rose over the year, reaching 0.8% in the middle of the year and 1.6% in November. Industrial prices rose most rapidly as the economy started to pick up. Stronger economic growth in 2004 is likely to push industrial prices up further.

Industrial production has been rising since July 2002, after Polish entrepreneurs adjusted to the slow economy by reducing costs and improving the quality of the goods they produce. In the last few months of 2003 exports increased and become more profitable as the strong euro improved the purchasing power of many of Poland's trade partners. In 2003 Poland recorded a current account surplus for the first time in five years. Poland's largest trading partner was the European Union, which accounted for 68.6% of its trade. Next were the countries of Central and Eastern Europe, where trade grew by 19%. The highest rate of growth was recorded in trade with the United States, which accounts for a fifth of all trade. Industrial production may continue to rise because of the reduction in CIT tax to 19% in 2004.

Unemployment in Poland is still very high - amounting to 18%-20%. Poland has the highest rate of unemployment among all the old and new member states of the EU. High unemployment in Poland is a result of the convergence of various factors, including structural and stagnation factors, as well as the lack of synchronisation between monetary, fiscal and social policy. Poles are unwilling to change their jobs and their place of residence. This leads to structural unemployment, which passes from generation to generation. Unemployment will remain the key social and economic problem in Poland, although its level may decline in 2004 to approximately 16%. It may transpire that the key to resolving this problem is EU funding and the improvement in Poland's image among foreign investors.

The Polish economy has found itself in a state of stagnation in recent years. Economic growth declined systematically. The trough of economic stagnation was in 2002, when the economy grew by just 1.1%. However, the Polish economy started to improve in 2003 and grew by 3.2%. In 2004 economic growth may exceed 4%, fuelled by domestic consumption, foreign investment (particularly from the EU) and industrial production.

Fiscal policy in 2003 was rather tight. The level of central budget expenditure did not change and as a result, the budget deficit remained high at 4.9% of GDP. State debt is therefore rising, and is already at 50% of GDP.

Deputy Prime Minister Jerzy Hausner has presented a plan to improve state finances in the medium term; fiscal policy in 2004 will depend on whether parliament adopts this plan and how it adapts to the Maastricht criteria for entering monetary union. In particular, the government will have to prevent state debt exceeding 60% of GDP and reduce the budget deficit to below 3% of GDP to meet these criteria. This will require

the government to make some painful spending cuts. Membership of the EU, to which Poland acceded on 1 May 2004, is likely to result in increased foreign investment, which should stimulate the economy, and EU funding to develop infrastructure and reduce unemployment.

The circulation of paid-for daily newspapers declined by 2% in 2003. Axel Springer's launch of a new daily newspaper called *Fakt* helped national dailies increase their circulation by 2.4%. *Fakt's* direct competitor *Super Express* experienced an 8.5% decline in its own circulation. Several of the specialist daily newspapers demonstrated sales growth; the 16% growth of *Gazeta Gieldy Parkiet* and 13% growth of *Gazeta Prawna* can be considered notable successes. *Puls Biznesu* grew by 6%, but *Gazeta Wyborcza* and *Rzeczpospolita* disclosed gentle declines of 0.8% and 1.1% respectively.

Fakt's launch exacerbated the decline of regional daily newspapers, which lost almost 7% of their circulation in 2003. Only two regional titles demonstrated sales growth, these being *Nowa Trybuna Opolska* (which grew 1.4%) and *Zycie Warszawy* (16.8%). The remaining 29 titles each lost between 0.2% and 25.7% of their circulation.

The launch of *Fakt* prompted the other daily newspapers to tidy up their layouts, improve their existing specialist inserts and introduce new inserts. Two regional newspapers reduced their cover prices to 1 zloty, which is *Fakt's* cover price.

Despite the decline daily newspapers' circulation, their gross advertising revenues increased by 45%. Their total revenues increased by 11%. (These growth rates are exaggerated because calculation methods and the number of titles monitored have changed. It is likely that total revenues actually increased by 3%-4%.)

Daily newspapers increased their share of the advertising market by four percentage points in 2003, while magazines held their share steady. Despite its 3% growth, television's share fell by almost four points.

Fierce competition between the media is continuing to incite battles over discounts, which amount to 40%-90% of price-list rates. State television is imposing uncomfortable conditions on other media through its price-list rates. Agora S.A. (*Gazeta Wyborcza*), TVN and Polsat have complained to the Office for Competition and Consumer Protection about price dumping by state television, which they say is "imposing dishonest, flagrantly low prices in selling airtime".

The decline in sales and an increase in costs have accelerated the process of consolidation and mergers. Polskapresse acquired 25% of the shares of Oficyna Wydawnicza (*Glos Wielkopolski*) in May, and in this way became the publisher of two daily newspapers in Poznan. In October 2003, Orkla Media sold two regional newspapers in Wroclaw - *Slowo Polskie* and *Wieczór Wroclawia* - to the Polskapresse publishing group. On 1 December a single *Slowo Polskie Gazeta Wroclawska* emerged to replace three separate newspapers, in which *Wieczór Wroclawia* became a daily insert. *Zycie Czestochowy* stopped publishing in the middle of the year.

The government took a series of steps in 2003 to amend Polish



law in preparation for joining the EU in May 2004. The most important amendments included the Act on VAT. As of 1 May 2004, the Act that was finally accepted introduces the following changes:

- An increase in VAT on print services from 0 to 22%,
- An increase in VAT from 0 to 7% on classified advertisements from private individuals,
- 67% limit on the proportion of advertising pages to editorial pages. Exceeding this limit will result in an increase in VAT on sales from 7% to 22%.

Following pressure from the media, beer advertisements have been allowed on television from 8pm. In return, beer advertising now faces a special 10% tax, the proceeds of which are designated for children's and youth's sports.

Parliament discussed the forthcoming Act on radio and television broadcasting throughout 2003. The government finally sent the draft Act, which adjusts it to EU directives, to the Sejm. The same applied to the Act on copyright and related rights, the final shape of which was accepted on 1 May 2004.

POPULATION

Population by age and sex

	All individuals		Male		Female		Households 000
	000	%	000	%	000	%	
0-15	7,389	19	3,784	20	3,605	18	13,337
16-24	5,844	15	2,976	16	2,868	15	
25-34	5,442	14	2,760	15	2,682	14	
35-44	5,246	14	2,635	14	2,611	13	
45-54	5,949	16	2,906	16	3,043	15	
55-64	3,461	9	1,596	9	1,866	9	
65+	4,888	13	1,850	10	3,037	15	
Total	38,219	100	18,507	100	19,712	100	

Source: Statistical Yearbook of the Republic of Poland 2003 (2002 data)

Households

Occupancy	Households	
	000	%
1 person	3,307	24.8
2 people	3,097	23.2
3 people	2,654	19.9
4 people	2,405	18.0
5 or more people	1,874	14.1
Total	13,337	100.0

Source: Statistical Yearbook of the Republic of Poland 2003 (2002 data)

Age structure of readership

Age	% of readership	% daily reach within age group
Under 16	1.3	22.0
16-24	18.0	28.3
25-34	18.2	31.5
35-44	19.6	33.4
45-54	21.9	36.0
55-64	12.2	33.0
65+	8.8	25.1
Total	100.0	31.4

Source: Polskie Badania Czytelnictwa

Population 15+ by education (%)

	Total	Total male	Total female	Urban total	Urban male	Urban female	Rural Total	Rural male	Rural female
A	10.2	9.3	10.4	13.2	13.0	13.5	4.2	3.4	4.9
B	3.3	1.6	4.6	3.9	2.0	5.5	1.9	0.9	2.9
C	8.8	5.4	11.7	11.2	7.2	14.7	4.3	2.4	6.2
D	20.6	20.6	18.7	22.3	24.2	20.5	15.3	14.8	15.7
E	24.1	30.1	16.9	20.4	26.7	14.9	28.0	35.6	20.7
F	28.1	28.0	31.4	23.9	22.0	25.6	39.7	37.6	41.7
G	2.8	3.0	4.3	2.3	2.0	2.6	5.9	4.6	7.2
H	2.1	2.0	2.0	2.8	2.9	2.7	0.7	0.7	0.7
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Source: Statistical Yearbook of the Republic of Poland 2003 (2002 data)

A= Tertiary

B= Post-secondary

C= General secondary

D= Vocational secondary

E= Basic vocational

F= Primary

G= Incomplete primary/none

H= Unknown

Newspaper reach (%)

	Daily
All adults 18+	31.8
Men	35.1
Women	27.9
MHS	33.3

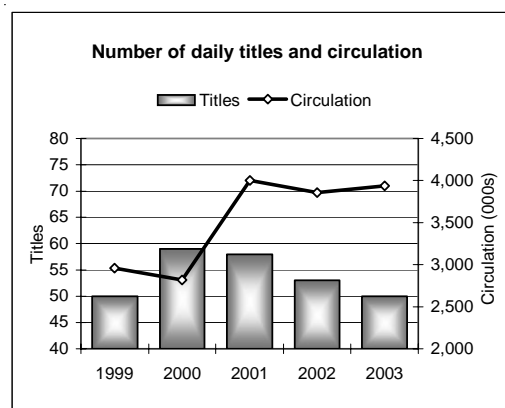
Source: Polskie Badania Czytelnictwa

MHS: Main Household Shopper



NUMBER OF TITLES AND CIRCULATION

	1999	2000	2001	2002	2003	Change (%)	
						99/2003	2002/03
Number of titles							
Total dailies	50	59	58	53	50	-15.25	-5.66
National dailies	10	15	11	12	12	-20.00	0.00
Regional & local dailies	40	44	35	34	35	-20.45	2.94
Free dailies	-	-	12	7	3	-	-57.14
Non dailies	-	-	15	21	17	-	-19.05
National non-dailies	-	-	5	3	2	-	-33.33
Regional & local dailies	-	-	10	17	15	-	-11.76
Free non-dailies	-	-	-	1	-	-	-
Sundays	-	-	1	3	3	-	0.00
Circulation (000)							
Total dailies	2,958	2,820	4,001	3,854	3,934	39.52	2.08
National dailies	1,440	1,157	1,924	1,894	1,939	67.65	2.38
Regional & local dailies	1,518	1,663	1,771	1,704	1,585	-4.69	-6.98
Free dailies	-	-	306	256	410	-	60.16
Non dailies	-	-	506	630	383	-	-39.21
National non-dailies	-	-	329	179	80	-	-55.31
Regional & local dailies	-	-	177	320	303	-	-5.31
Free non-dailies	-	-	-	131	-	-	-
Sundays	-	-	18	47	42	-	-10.64
Total annual sales (millions of copies)							
Dailies	833	846	1,192	1,070	1,095	29.47	2.36
National dailies	-	-	-	-	582	-	-
Regional & local dailies	-	-	-	-	456	-	-
Free dailies	-	-	-	-	57	-	-
Non-dailies	-	-	56	50	20	-	-60.60
National non-dailies	-	-	-	-	4	-	-
Regional & local dailies	-	-	-	-	15	-	-
Sundays	-	-	1	2.3	1.6	-	-30.43

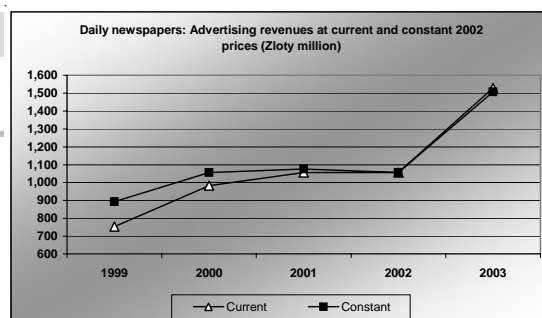


Source: 1999-2000 Press Research Centre, 2001-2003 Ośrodek Badań Prasoznawczych, based on ZKDP data

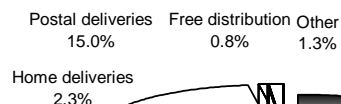
MORE FACTS

	1999	2000	2001	2002	2003	Change (%)	
						99/2003	2002/03
Advertising revenues (Zloty million)							
Daily newspapers	753	982	1,056	1,056	1,528	102.92	44.70
Daily newspapers §	892	1,056	1,076	1,056	1,507	20.67	1.94

Source: Expert Monitor www.expert-monitor.pl
§ at constant 2002 prices



Type of newspaper sales in 2003 (%)



Type of newspaper sales (%)

	Single copy	Home deliveries	Postal deliveries	Free distribution	Other
2001	85	-	15	-	-
2002	84	11	5	-	-
2003	80.6	2.3	15.0	0.8	1.3

Source: Ośrodek Badań Prasoznawczych, based on ZKDP data

Distribution and newsprint costs

	1999	2000	2001	2002	2003
As % of average cover price					
Single copy sales	-	-	-	-	31
Home deliveries	-	-	-	-	31
Postal deliveries	-	-	-	-	31
Newsprint costs (average per ton)					
Zloty	1,900	1,909	2,210	1,968	1,925

Source: IWP



Top ten dailies (2003)

Title	Publisher	Circulation (000)	Readership (000)	Cover Prices				Format	Full page rate (Zloty)	
				Weekday		Weekend			Mono	Colour
				Zloty	US\$	Zloty	US\$			
Fakt	Axel Springer Polska	715	3,660	1.00	0.25	1.00	0.25	Tabloid	50,000	50,000
Gazeta Wyborcza	Agora SA	542	5,670	2.00	0.49	2.40	0.59	Tabloid	84,900	84,900
Super Express	Media Express	406	4,110	1.60	0.39	2.10	0.51	Tabloid	45,360	64,800
Rzeczpospolita	Prespublica (Orkla)	247	1,356	2.50	0.61	2.50	0.61	Broadsheet	49,840	59,920
Dziennik Sportowy	Marquard Media Polska	141	1,212	1.70	0.42	1.90	0.47	Tabloid	18,025	23,433
Gazeta Prawna	Grupa Wydawnicza Infor	126	447	3.45	0.85	3.95	0.97	Tabloid	18,200	21,000
Gazeta Pomorska	Gazeta Pomorska Media (Orkla)	116	726	1.20	0.29	1.70	0.42	Tabloid	8,400	10,920
Nasz Dziennik	SPES	110	600	1.30	0.32	1.60	0.39	Tabloid	6,500	8,450
Dziennik Zachodni	Polskapresse	108	1,386	1.30	0.32	1.60	0.39	Tabloid	13,524	15,456
Dziennik Polski	Jagiellonia	87	672	1.30	0.32	1.60	0.39	Tabloid	5,880	8,820

Source: Circulation: ZKDP Readership: CCS

Top ten advertising categories (2003)

Advertising sector	% of total ad revenue
Transport	10.3
Telecommunications	6.6
Wholesale, shops	6.3
Financial institutions and banks	6.2
Property	3.8
Building materials	3.0
Supermarkets, department stores	2.7
Tourism and sport	2.5
Electronics	2.0
Education	1.9

Source: Expert Monitor www.expert-monitor.pl

Top publishing companies (2003)

Company	Total copy sales (mill)
Grupa Orkla	218.8
Axel Springer Polska (Fakt)	216.7
Grupa Polskapresse	200.4
Agora S.A.	188.4
Media Express	123.0
Marquard Media Polska	50.9
Grupa Solowowa	42.2
SPES (Nasz Dziennik)	33.3
TPP (Metropol)	33.2
Grupa Wydawnicza Infor	31.8

Source: Ośrodek Badań Prasoznawczych, based on ZKDP data

Top ten advertisers (2003)

Advertiser	Newspaper expenditure Zloty (000)
Polska Telefonia Cyfrowa	49,295
Fiat Auto Poland	36,740
Polkomtel S.A.	28,976
Renault S.A.R.L. Polska	20,619
Ptk Centertel	20,149
Euro RTV AGD	19,737
Volkswagen Group - Kulczyk Tradex	13,265
PKO BP S.A.	13,173
Citroen Polska	12,455
Ford	11,943

Source: Expert Monitor www.expert-monitor.pl

Newspaper colour capability & formats

Number of:	1999	2000	2001	2002	2003
4-colour newspapers	46	-	51	-	63
Broadsheets	2	-	3	-	2
Tabloids	48	-	73	-	63
Other	-	-	-	-	5

Source: Katalog Mediów Polskich 2003 (electronic version); OBP UJ

Media consumption (minutes per day)

Media	2003
Newspapers	20
National newspapers	10
Regional newspapers	10
Magazines	30
Radio	120
Television	150
Internet	20

Source: Ośrodek Badań Prasoznawczych, based on AGB and SMG/KRC data

Internet publishing (No. of online editions)

	2001	2002	2003
Dailies	56	41	45
Non-dailies	-	10	12
Sundays	-	-	1

Source: Ośrodek Badań Prasoznawczych

Cover prices

	Zloty
Single copy	1.00-3.95
Subscription	0.50-3.95

Source: ZKDP

CROSS MEDIA OWNERSHIP

Owners	Regional TV	National TV	Regional Newspapers	National Newspapers	Radio
Regional TV Licensees	No restriction	No restriction	No restriction	No restriction	No restriction
National TV Licensees	No restriction	No restriction	No restriction	No restriction	No restriction
Regional Newspaper Owners	No restriction	No restriction	No restriction	No restriction	No restriction
National Newspaper Owners	No restriction	No restriction	No restriction	No restriction	No restriction
Satellite TV Broadcasters	No restriction	No restriction	No restriction	No restriction	No restriction
Local radio Licensees	No restriction	No restriction	No restriction	No restriction	No restriction
National radio Licensees	No restriction	No restriction	No restriction	No restriction	No restriction
Foreign Investors	May own no more than 33% of shares	May own no more than 33% of shares	No restriction	No restriction	May own no more than 33% of shares



ADVERTISING EXPENDITURE & ECONOMIC DATA

Advertising expenditure	(Zloty million, in current prices)										
	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
Newspapers	308	444	664	753	985	1,051	1,056	1,172	1,420	1,553	1,723
Magazines	327	522	741	1,113	1,262	1,403	1,406	1,572	1,788	1,999	2,203
Television	1,233	1,900	2,833	4,048	4,452	6,064	6,402				
Radio	183	258	382	491	544	617	754				
Cinema	0	4	7	14	27	48	44				
Outdoor	189	303	460	536	685	633	629				
Total	2,241	3,431	5,088	6,955	7,955	9,840	10,324	11,103	12,349	13,622	14,984

Source: 1996-2002 Amer Nielsen, 2003-2006 ZenithOptimedia

Notes: Before discounts, excludes agency commission, production costs and classified advertising

Main economic indicators 1996-2002

	1996	1997	1998	1999	2000	2001	2002
1 US\$= 4.08 Zloty at 2002 rate							
Gross Domestic Product (Zloty billion)							
at current prices	388	472	554	615	712	749	769
% change	25.9	21.8	17.2	11.1	15.8	5.2	2.7
at 2002 prices	634	671	703	728	766	764	769
% change	5.1	5.8	4.9	3.6	5.1	-0.3	0.8
Gross Domestic Product per capita (Zloty 000)							
at current prices	10.0	12.2	14.3	15.9	18.4	19.4	19.9
at 2002 prices	16.4	17.3	18.2	18.8	19.8	19.8	19.9
Population							
Millions	38.6	38.7	38.7	38.7	38.7	38.6	38.6
Consumer Price Index							
2002=100	61.2	70.4	78.7	84.4	93.0	98.1	100.0
%change	19.8	15.1	11.7	7.3	10.2	5.5	1.9
Ad.spend as a % of GDP							
	0.58	0.73	0.92	1.13	1.12	1.31	1.34
Advertising Expenditure Growth (%)							
at current prices	53.4	53.1	48.3	36.7	14.4	23.7	4.9
at 2002 prices	28.0	33.0	32.7	27.4	3.8	17.3	3.0

Source: IFS, ZenithOptimedia

Research

Circulation is audited by: Zwiasek Kontroli Dystrybucji Prasy (ZKDP) - Audit Bureau of Circulations Poland. ZKDP audits 358 titles (49 dailies, 309 magazines). Every publisher-member of ZKDP declares the print run and circulation of the titles they own each month, with details of distribution by area and distribution methods. These declarations are verified once a year by an auditor authorised by ZKDP.

Readership is measured by: Readership is measured by Polskie Badania Czytelnictwa (PBC), which co-operates with SMG/KRC Poland Media Ltd.

Methodology: Monthly face-to-face interviews, annual sample size 36,000.

Taxes

VAT on: single copy sales 7% subscription sales 7%
display advertising 7% classified advertising 22%
newsprint 22% composition 22%
(standard VAT rate 22%)

Newspapers are subject to the normal 28% corporation tax. VAT was only introduced for printing newspapers, magazines and books at the end of 2003.

Discounts

on: post 0 rail 0 telephone 0 telegraph 0 telex 0

Ownership

Does any law exist governing publishing-house ownership, or the registration of shares in newspaper-publishing companies? No

Is there any law prohibiting or restricting foreign companies or

individuals from owning shares, and in particular, the majority of shares, of domestic daily newspapers? No

Is there any law prohibiting daily newspaper or periodical publishers from operating radio or television stations in the same locality? No

So as to guarantee disclosure and transparency in the capital structure and to avert silent partnerships, is there a law or rule making it possible to determine who actually owns a publishing company? Yes, Polish company law requires that any owner of at least 10% of shares in a limited company be identified in the national register of entrepreneurs. However, this will only identify the registered owners; the beneficial owners will not be identified.

Is there an antitrust law limiting concentration in the daily press? Yes. A 'dominant position' in a market is officially defined as the ability to prevent effective competition in the market and conduct its business independently of its competitors and customers to a significant extent.

It is presumed that a company has a dominant position when its share of the market exceeds 40%; there are no separate circulation thresholds at local, regional and national levels.

The Act on Competition and Consumer Protection of 15 December 2000 (Journal of Laws of 2003, No. 86, item 804, the "Act") stipulates that mergers and takeovers are subject to inspection by the President of the Office for Competition and Consumer Protection if the total turnover of the businesses taking part in the transaction exceeded €50 million in the previous financial year and if

- 1) the turnover of the enterprise that is the target of the acquisition, or the shares of which are to be acquired or purchased, did not exceed €10 million in either of the two financial years preceding the transaction;
- 2) the total market share of the businesses taking part in the transaction does not exceed 20%;
- 3) the transaction is based on the temporary acquisition of shares by a financial institution;
- 4) the transaction is based on the temporary acquisition of shares by an entrepreneur to secure receivables;
- 5) the transaction is the consequence of bankruptcy or arrangement proceedings;
- 6) the transaction is conducted within the framework of a single capital group.

Is further regulation of media concentration expected? The Polish parliament is working on a new radio and television law, which is expected to contain new media concentration regulations. It is not known what these regulations are likely to be.

POPULATION

Population by age and sex

	All individuals		Male		Female		Households 000
	000	%	000	%	000	%	
0-15	1,657	16	848	17	809	15	3,420
16-24	1,480	14	752	15	728	14	
25-34	1,576	15	789	16	788	15	
35-44	1,499	14	736	15	763	14	
45-54	1,329	13	643	13	686	13	
55-64	1,122	11	525	11	597	11	
65+	1,693	16	708	14	985	18	
Total	10,356	100	5,000	100	5,356	100	

Source: INE - Census 2001

Population by social class and sex

	All adults		Male		Female	
	000	%	000	%	000	%
AB	1,177	15	626	18	533	13
C1	2,099	28	1,055	29	1,015	26
C2	2,273	30	1,073	30	1,170	30
D	2,079	27	823	23	1,233	31
Total	7,628	100	3,577	100	3,951	100

Source: Consumidor 2001 (Marktest)

AB = top/middle management

C1 = skilled workers

C2 = unskilled workers

D = pensioners, the unemployed and other unskilled workers

Age structure of readership (1999)

Age	% of readership	% reach within age group
0-15	7.5	79.3
16-24	16.9	83.7
25-34	20.7	78.7
35-44	18.6	76.6
45-54	15.2	71.9
55-64	11.7	57.2
65+	9.4	37.1

Source: Marktest

NUMBER OF TITLES AND CIRCULATION

	1999	2000	2001	2002	2003	Change (%)	
						99/2003	2002/03
Number of titles							
Total dailies*	28	-	-	28	29	3.57	3.57
National dailies	10	-	-	10	11	10.00	10.00
Regional dailies	18	-	-	18	18	0.00	0.00
Non-dailies	242	-	-	242	242	0.00	0.00
National non-dailies	14	-	-	14	14	0.00	0.00
Regional non-dailies	228	-	-	228	228	0.00	0.00
Free papers	2	-	-	3	5	150.00	66.67
Circulation (000)							
Total dailies	686	1,026	614	595	571	-16.76	-4.03
National dailies	612	504	506	500	523	-14.54	4.60
Regional dailies	74	52	108	95	48	-35.14	-49.47
Non-dailies	1,152	1,134	1,338	867	702	-39.06	-19.03
National non-dailies	375	422	395	405	377	0.53	-6.91
Regional non-dailies **	777	712	943	462	325	-58.17	-29.65
Free papers	582	835	1	789	3	-99.56	-99.67
Total annual sales (millions of copies)							
Dailies	227	-	546	519	-	128.33	-4.95
Non-dailies	69	-	272	273	-	294.51	0.37

Source: OBERCOM (based on ICS registrations and APCT data)

* Newspapers published at least four days a week

** Only a few regional titles are audited

Housewives (cohabiting persons - 1999)

	Housewives	
	000	%
under 25	182	5
25-34	628	19
35-44	652	19
45-54	581	17
55-64	567	17
65+	766	23
Total	3,376	100

Source: Marktest

Households

Occupancy	Households	
	000	%
1 person	565	17
2 people	1,010	30
3 people	900	26
4 people	712	21
5 or more people	232	7
	3,420	
without children	503	17
with children (0-13)	2,542	8
with oldest child aged 0-2	632	21
with oldest child aged 3-6	929	31
with oldest child aged 7-13	981	32
Total	3,045	

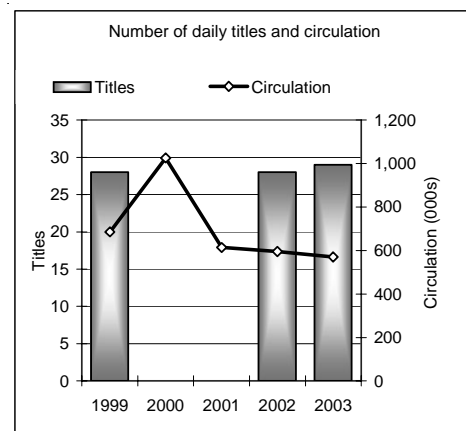
Source: INE - Census 2001

Newspaper reach %

	Daily
All adults	38.7
Men	59.2
Women	27.4
MHS	24.5

Source: Marktest

MHS: Main Household Shopper





MORE FACTS

	1998	1999	2000	2001	2002	Change (%) 98/2002
Advertising revenues (Euro million)*						
Dailies	-	-	-	-	244	-
Dailies §	-	-	-	-	244	-
Non-dailies	-	-	-	-	-	-
Sales revenues (Euro million)^						
Dailies	140	126	-	-	159	13.40
Dailies §	159	141	-	-	159	-0.28
Non-dailies	74	80	-	-	120	61.36

Source: OBERCOM

§ at constant 2002 prices

*includes classified, inserts, and production costs

^includes VAT

Contribution of classified, display and insert advertising to total advertising income (%)

	1997	1998	1999
Display	71	72	72
Classified	27	26	26
Inserts	2	2	2

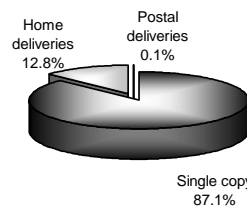
Source: Marktest

Type of newspaper sales (%)

	Single copy	Home and postal deliveries	Free distribution
2001	87.0	12.0	1.0
2002	87.1	12.8	0.1

Source: OBERCOM (based on APCT data)

Type of newspaper sales in 2002 (%)



Distribution costs

	1997	1998	1999
As % of average cover price			
Single copy sales *	30	30	30
Home deliveries	33	33	32
Postal deliveries	67	67	66

*distributor and newsagent receive about 15% of revenues each

Top dailies (2003)

Title	Publisher	Circulation (000)	Readership (000)	Cover Price		Format	Full page rate (Euro)	
				Euro	US\$		Mono	Colour
Correio da Manhã	Presselivre, Imprensa Livre	107	798	0.92	0.87	Tabloid	7,077	9,909
Jornal de Notícias	Empresa do Jornal de Notícias	102	1,003	0.60	0.56	Tabloid	9,710	13,595
Record	Edisport, Sociedade Editorial	93	681	0.65	0.61	Tabloid	7,198	8,102
Público	Público, Comunicação Social	58	431	0.96	0.90	Tabloid	5,078	6,601
Diário de Notícias	Diário de Notícias	54	389	0.93	0.87	Tabloid	6,854	9,596
24 Horas	Prodiário	40	260	0.50	0.47	Tabloid	2,736	3,420
O Jogo	Jornalinveste-Comunicação	35	383	0.65	0.61	Tabloid	2,811	3,927
Diário de Notícias de Madeira	Empresa do Diário de Notícias	16	-	0.60	0.56	Tabloid	1,172	1,758
Diário Económico	ST & SF, Sociedade de Publicações	11	131	1.00	0.94	Tabloid	3,395	3,920
Jornal de Negócios	Mediafin-Sociedade Editora	10	64	1.00	0.94	Tabloid	2,150	3,733

Source: OBERCOM

Top ten advertising categories (2001)

Advertising sector (ranked by expenditure)
Telecoms
Vehicles
Banking/insurance
Public services
Media
Corporate services
Office equipment
Development
Tourism
Construction

Source: Universal Media

Top ten publishing companies (2003)

(ranked by total circulation)
Publiregiões
Sojornal, Sociedade Editorial
Empresa do Jornal de Notícias
Presselivre, Imprensa Livre
Edisport, Sociedade Editorial
Prodiário
Público, Comunicação Social
Diário de Notícias
Jornalinveste-Comunicação
ST & SF, Sociedade de Publicações

Source: OBERCOM, APCT

Top ten advertisers * (2003)

Advertiser	Gross expenditure Euro (000)
Impala	9,982
TMN	7,774
Renault	7,358
Vodafone Telecel	6,656
Banco Português do Investimento	5,506
L'Oreal	5,268
Grupo Caixa Geral de Depósitos	4,532
Portugal Telecom	4,514
Tempus International	4,173
Parfum et Beauté	4,086

Source: Media Monitor, Marktest, OBERCOM

* for print media - newspapers and magazines

Internet publishing (No. of online editions)

	1999	2000	2001	2002
Dailies	12	-	-	12
Non-dailies	49	-	-	76

Source: OBERCOM

Employment

	1999	2000
Total no. of employees	2,849	2,628

Source: DETEFP

Online readership (no. of page impression per month)

Newspaper	2002	2003
A Bola (www.abola.pt)	69,180	126,554
Record (www.record.pt)	31,581	47,848
Público (www.publico.pt)	23,993	26,228
Expresso (www.expressonline.pt)	12,235	25,934
Diário de Notícias (www.dn.sapo.pt)	10,590	11,682

Source: Marktest, Estudo NetPanel

Newspaper colour capability & formats

Number of:	2002	2003
4-colour newspapers	235	235
Broadsheets	2	2
Tabloid	233	233

Source: ICS



Media consumption (minutes per day)

Adults	2001	2002
Radio	71	86
Television	182	206

Source: Marktest, Bareme Radio/Media Monitorl

Cover prices

	Euro
Single copy	0.55
Subscription	0.44

Source: OBERCOM

ADVERTISING EXPENDITURE & ECONOMIC DATA

Advertising expenditure

(Euro million, in current prices)

	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
Newspapers	47	56	72	92	99	89	71	69	70	72	74
Magazines	96	110	134	170	181	160	145	145	148	152	157
Television	272	330	385	455	519	484	445				
Radio	31	46	47	58	62	61	54				
Cinema	0	0	4	5	6	7	6				
Outdoor	58	64	75	86	99	103	103				
Internet	0	0	4	4	5	5	5				
Total	504	606	721	870	970	909	829	847	888	915	950

Source: 1996-2002 Sabatina/ZenithOptimedia, 2003-2006 ZenithOptimedia

Notes: Before discounts, excludes production costs, agency commission and classified advertising.

Main economic indicators 1996-2002

	1996	1997	1998	1999	2000	2001	2002
1 US\$=	1.06						
	Euro at 2002 rate						
Gross Domestic Product (Euro billion)							
at current prices	84	89	96	108	116	123	129
% change	6.4	6.2	7.8	12.5	7.0	6.5	5.1
at 2002 prices	100	104	109	120	125	128	129
% change	6.9	4.0	4.7	10.0	4.0	2.1	1.4
Gross Domestic Product per capita (Euro 000)							
at current prices	8	9	10	11	12	12	13
at 2002 prices	10	10	11	12	12	13	13
Population							
Millions	9.9	9.9	10.0	9.9	10.0	10.0	10.0
Consumer Price Index							
2002=100	83.7	85.5	87.9	89.9	92.5	96.5	100.0
%change	3.1	2.1	2.9	2.3	2.3	4.3	3.6
Ad.spend as a % of GDP							
	0.60	0.68	0.75	0.81	0.81	0.74	0.64
Advertising Expenditure Growth (%)							
at current prices	19.3	20.3	18.9	20.6	11.5	-6.2	-8.8
at 2002 prices	15.7	17.8	15.6	18.0	8.3	-10.1	-12.0

Source: IFS, ZenithOptimedia

Research

Circulation is audited by: APCT (Associação Portuguesa para o Controlo de Tiragem e Circulação)

Readership is measured by: Marktest

Taxes

VAT on: sales 19%* advertising 5% newsprint 19%
plant 5% composition 19%

Newspaper profits are taxed at 37.4%, which is the standard rate of corporation tax

* Single copy only - subscription sales 5%

Subsidies

There are several direct subsidies: Incentive for Technological Modernization, Incentive for E-Content Production, Incentive for Private Enterprises Development and Innovation, and Incentive for Human Resources Forming and Requalification.

Discounts

on: post 55%-60% rail 0 telephone 0 telegraph 0 telex 0

Ownership

Does any law exist governing publishing-house ownership, or the registration of shares in newspaper-publishing companies? No

Is there any law prohibiting or restricting foreign companies or individuals from owning shares, and in particular, the majority of shares, of domestic daily newspapers? Yes, foreign companies can only own up to 10%.

Is there any law prohibiting daily newspaper or periodical publishers from operating radio or television stations in the same locality? No

So as to guarantee disclosure and transparency in the capital structure and to avert silent partnerships, is there a law or rule making it possible to determine who actually owns a publishing company? No.

Is there an antitrust law limiting concentration in the daily press? No

	1999	2000	2001	2002	2003
Total	726,816	1,305,350	785,430	1,219,535	1,562,538

Is further regulation of media concentration expected? No

POPULATION & MORE FACTS

Population by age and sex

	All individuals (0-64)		Male		Female		Households 000
	000	%	000	%	000	%	
0-15	656	18	336	19	320	17	1,325
16-24	379	11	193	11	185	10	
25-34	449	12	227	13	223	12	
35-44	534	15	254	15	280	15	
45-54	719	20	333	19	386	21	
55-64	862	24	384	22	478	26	
Total	3,599	100	1,727	100	1,872	100	

Source: ZenithOptimedia

NUMBER OF TITLES AND CIRCULATION

Top dailies (2001)

Title	Circulation (000)	Readership (000)	Full page rate (US\$)	
			Mono	Colour
El Nuevo Dia	205	1,171	6,084	8,084
El Vocero	174	1,058	4,992	6,492
The San Juan Star	100	104	4,536	6,036
Primera Hora	99	350	3,354	4,554
Caribbean Business	45	229	6,084	7,384

Source: ZenithOptimedia

MORE FACTS

Top ten advertising categories (2001)

Advertising sector	Newspaper expenditure US\$ (000)
Services & institutions	191,376
Retail	136,873
Cars	80,422
Media/travel/entertainment	42,192
General merchandise	9,481
Beverages & tobacco	7,643
Health & beauty	5,210
Food	2,375
Clothing & accessories	982
Unclassified ads	634

Source: Adtrac

Top ten advertisers (2001)

Advertiser	Newspaper expenditure US\$ (000)
Sears Roebuck	12,557
Pitusa	10,843
JCPenney	7,780
Banco Popular	6,825
Centennial	4,603
Kmart	4,388
Grupo Santander	3,926
Doral Mortgage	3,815
RG Mortgage	3,789
TLD Communications	3,622

Source: Adtrac

ADVERTISING EXPENDITURE & ECONOMIC DATA

Main economic indicators 1996-2002

	1996	1997	1998	1999	2000	2001	2002
National currency is the US\$							
Gross Domestic Product (US\$ million)							
at current prices	45,341	48,187	54,086	57,841	61,045	67,891	69,314
% change	6.3	6.3	12.2	6.9	5.5	11.2	2.1
at 2002 prices	59,749	60,191	64,158	64,902	64,392	69,452	69,314
% change	0.8	0.7	6.6	1.2	-0.8	7.9	-0.2
Gross Domestic Product per capita (US\$)							
at current prices	12,091	12,782	14,233	14,881	15,494	17,231	17,592
at 2002 prices	15,933	15,966	16,884	16,697	16,343	17,628	17,592
Population							
Millions	3.8	3.8	3.8	3.9	3.9	3.9	3.9
Consumer Price Index							
2002=100	75.9	80.1	84.3	89.1	94.8	97.8	100.0
%change	5.5	5.5	5.3	5.7	6.4	3.1	2.3
Ad.spend as a % of GDP							
	2.29	2.62	2.54	2.70	2.68	2.62	2.59
Advertising Expenditure Growth (%)							
at current prices	15.6	21.6	8.6	13.9	4.8	8.4	1.2
at 2002 prices	9.5	15.2	3.2	7.7	-1.5	5.2	-1.1

Source: IFS, ZenithOptimedia

Advertising expenditure (US\$ millions, in current prices)

	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
Newspapers	317	416	462	500	489	478	508	530	560	590	608
Magazines	26	31	32	38	46	48	51	52	53	53	53
Television	615	697	754	896	978	1,118	1,104				
Radio	71	108	114	116	111	118	119				
Cinema	3	3	3	4	4	4	4				
Outdoor	7	8	7	9	9	9	10				
Internet	0	0	0	0	1	1	1				
Total	1,039	1,263	1,372	1,563	1,638	1,776	1,797	1,942	2,084	2,303	2,447

Source: 1996-2002 AdTrack 2003-2006 ZenithOptimedia

Notes: Before discounts, includes agency commission and classified, excludes production costs

POPULATION

Population by age and sex

	All individuals		Male		Female		Households 000
	000	%	000	%	000	%	
0-14	200	25	102	20	98	36	99
15-64	572	72	404	77	168	62	
65+	21	3	15	3	6	2	
Total	793	100	521	100	272	100	

Source: CIA

MORE FACTS

Top dailies (2000)

Title	Circulation (000)	Readership (000)	Full page rate (US\$)	
			Mono	Colour
Al Sharq	47	166	2,750	4,400
Arrayah	18	163	2,771	5,542
Gulf Times	15	40	5,542	11,084
Al Watan	15	35	2,800	4,200

Source: ZenithOptimedia

Top ten advertising categories (2000)

Advertising sector	Newspaper expenditure US\$ (000)
Passenger cars	2,295
Watches	1,688
Road vehicle range	1,466
Fast food outlets	1,339
Department stores	1,128
Four-wheel drive	1,124
Airline	812
Fashion accessories	699
Retail	624
Communications	564

Source: PARC

Top ten advertisers (2000)

Advertiser	Newspaper expenditure US\$ (000)
Nissan	1,206
Chevrolet	640
Q-Tel	559
McDonald's	495
Toyota	419
Doha Bank	408
Qatar Airways	347
Qatar National Bank	320
Ford	312
Emirates	295

Source: PARC

ADVERTISING EXPENDITURE & ECONOMIC DATA

Main economic indicators 1996-2002

	1996	1997	1998	1999	2000	2001	2002
1 US\$=	3.64						
	Riyals at 2002 rate						
Gross Domestic Product (Riyals million)							
at current prices	32,976	41,124	37,330	44,397	59,893	58,794	-
% change	11.3	24.7	-9.2	18.9	34.9	-1.8	-
at 2000 prices	35,731	43,302	38,492	45,001	59,893	-	-
% change	8.6	21.2	-11.1	16.9	33.1	-	-
Gross Domestic Product per capita (Riyals)							
at current prices	63,415	77,592	69,130	79,280	105,075	97,990	-
at 2000 prices	68,714	81,701	71,281	80,358	105,075	-	-
Population							
Millions	0.5	0.5	0.5	0.6	0.6	0.6	0.6
Consumer Price Index							
2000=100	92.3	95.0	97.0	98.7	100.0	-	-
%change	2.5	2.9	2.1	1.7	1.4	-	-
Ad.spend as a % of GDP							
	0.25	0.25	0.34	0.30	0.22	0.27	-
Advertising Expenditure Growth (%)							
at current prices	28.6	28.4	21.2	7.1	-3.7	20.8	15.9
at 2000 prices	25.4	24.8	18.6	5.3	-5.0	-	-

Source: IFS, ZenithOptimedia

Advertising expenditure (US\$ millions, in current prices)

	1995	1996	1997	1998	1999	2000	2001	2002
Newspapers	12.6	19.0	25.5	31.6	34.6	33.8	40.4	44.2
Magazines	0.5	0.3	-	-	-	0.3	0.5	0.8
Television	4.1	3.0	3.0	3.0	2.5	1.6	2.2	4.9
Total	17.3	22.3	28.6	34.6	37.1	35.7	43.1	50.0

Source: PARC

Notes: Before discounts, includes agency commission, excludes classified and production costs

POPULATION

Population by age and sex (2001)

	All individuals		Male		Female		Households 000
	000	%	000	%	000	%	
0-6	1,615	7	830	8	785	7	7,289
7-14	2,535	11	1,301	12	1,234	11	
15-18	1,301	6	673	6	628	5	
19-25	2,759	12	1,413	13	1,346	12	
26-35	3,409	15	1,727	16	1,682	15	
36-45	3,028	14	1,503	14	1,525	13	
46-55	2,714	12	1,323	12	1,391	12	
56-65	2,333	10	1,077	10	1,256	11	
66+	2,736	12	1,122	10	1,615	14	
Total	22,430	100	10,968	100	11,462	100	

Source: National Commission for Statistics

Population status (2002)

	All adults		Male		Female	
	000	%	000	%	000	%
A+B	5,002	22	2,804	26	2,198	19
C1	2,737	12	1,363	12	1,374	12
C2	7,200	32	3,398	31	3,802	33
D	2,489	11	1,217	11	1,272	11
E	5,003	22	2,186	20	2,817	25
Total	22,431	100	10,968	100	11,463	100

Source: Mercury research

AB = top and middle managers and professionals

C1 = well-educated non-manual employees

C2 = skilled workers and non-manual employees

D = unskilled manual workers

E = less educated people

Newspaper reach 2002 (%)

	Daily	Weekly	Monthly
All adults	15	28	37

Source: AGB Data Research, TGI Romania

NUMBER OF TITLES AND CIRCULATION

	2001
Number of titles	
Total dailies	46
National dailies	15
Regional dailies	31
Non-dailies	78
National non-dailies	67
Regional non-dailies	11
Circulation (000)	
Total dailies	1,279
National dailies	806
Regional dailies	473
Non-dailies	1,679
National non-dailies	1,589
Regional non-dailies	90

Source: Romanian Press Club

(figures only available for these 124 publications)

MORE FACTS

Top ten advertising categories (2001)

Advertiser	Newspaper expenditure US\$ (000s)
Prime TV	2,502
Mobifon	2,405
Radio Contact	1,922
Digicom	1,650
Mobil Rom	1,488
Romtelecom	1,372
British American Tobacco	1,224
Compaq	1,148
Cosmorom	1,119
Petrom	1,119

Source: Alfacont Mediatrack

Top ten product categories (2001)

	Newspaper expenditure US\$ (000s)
Mobile telecoms	7,881
TV stations	4,667
Radio stations	3,497
Tobacco	3,041
Internet services	2,421
Retail	2,338
Computer hardware	2,309
Finance	2,146
Government/municipalities	2,141
Other services	2,123

Source: Alfacont Mediatrack

Top dailies (2003)

Title	Publisher	Circulation 000	Newspaper reach 000	Cover Price		Format	Copies sold annually (millions)	Total number of journalists
				ROL	US\$			
Libertatea	Ringier Romania S.R.L.	287	1,087	5,000	0.13	Tabloid	88.5	50
Adevărul	Adevărul S.A.	135	427	6,000	0.15	Broadsheet	41.4	90
Evenimentul zilei	Expres S.R.L.	102	743	6,000	0.15	Broadsheet	31.4	255
ProSport	Ringier Romania S.R.L.	90	548	7,250	0.19	Broadsheet	27.6	50
România liberă	R S.A.	74	130	6,000	0.15	Broadsheet	22.8	123
Jurnalul Național	Editura Intact S.R.L.	41	307	6,000	0.15	Tabloid	12.2	-
Cotidianul	RH Printing & Publishing S.R.L.	30	85	5,000	0.13	Broadsheet	8.6	60
Gardianul	Amber Press S.R.L.	29	110	5,000	0.00	Broadsheet	9.1	90

The above newspapers generated total sales revenues of €8.2 million in 2003, and total advertising revenues of €26.3 million.



ADVERTISING EXPENDITURE & ECONOMIC DATA

Main economic indicators 1996-2002

	1996	1997	1998	1999	2000	2001	2002
Exchange rate							
1 US\$=Lei	3,084	7,168	8,876	15,333	21,709	29,061	33,055
Gross Domestic Product (Lei billion)							
at current prices	108,920	252,926	373,798	545,730	800,308	1,167,243	1,500,413
% change	51.0	132.2	47.8	46.0	46.6	45.8	28.5
at 2002 prices	1,545,283	1,408,148	1,308,127	1,309,912	1,318,690	1,430,327	1,500,413
% change	8.8	-8.9	-7.1	0.1	0.7	8.5	4.9
Gross Domestic Product per capita (Lei 000)							
at current prices	4,817	11,216	16,613	24,298	35,664	52,086	66,953
at 2002 prices	68,345	62,446	58,139	58,322	58,765	63,825	66,953
Population							
Millions	22.6	22.6	22.5	22.5	22.4	22.4	22.4
Consumer Price Index							
2002=100	7.0	18.0	28.6	41.7	60.7	81.6	100.0
% change	38.8	154.8	59.1	45.8	45.7	34.5	22.5
Ad.spend as a % of GDP							
	0.26	0.32	0.51	0.35	0.35	0.29	0.28
Advertising Expenditure Growth (%)							
at current prices	146.6	188.3	132.9	0.4	44.4	24.0	20.7
at 2002 prices	77.7	13.1	46.4	-31.2	-0.9	-7.8	-1.5

Source: IFS, ZenithOptimedia

Advertising expenditure

(Lei million, in current prices)

	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
Print media	37,011	113,253	355,024	245,325	434,174	523,094	661,108	856,664	1,242,941	1,524,530	1,745,793
Television	209,110	494,588	1,161,644	1,226,624	1,649,861	2,034,256	2,479,155				
Radio	11,088	40,140	63,904	61,331	97,689	145,304	198,332				
Outdoor	7,711	94,975	150,885	229,992	347,339	406,851	396,665				
Total	284,812	821,088	1,912,520	1,919,667	2,772,201	3,437,893	4,148,453	5,965,495	8,540,782	11,204,450	13,623,204

Source: 1996-2001 AGB Data Research, industry sources, 2002-2006 ZenithOptimedia

Notes: Before discounts until 1998, after discounts from 1999, excludes classified, production costs and agency commission

Commentary – Guild of Press Publishers

General economic situation

The economy is stable, particularly in the regions. Individual incomes are growing, and the consumer credit market is developing. Advertising revenues are growing rapidly, particularly for television channels and outdoor contractors. There has been explosive growth in mobile telephony and internet use. New private printing presses with colour capacity are being constructed in Moscow and the regions. The government has talked about privatising state-owned printing presses and the need for less state intervention in the press.

Performance of newspapers vs. other media

Printing and colour quality remains low in most regions. Publishers of national and network newspapers continue regional expansion: InterMediaGroup (owner of a network of TV guides) launched four new titles, bringing its total to 39. *Sovietskiy Sport* launched an edition in Dagestan and a supplement (*EuroFootball*) in Estonia. *Vedomosti*, which already has regional editions in Novosibirsk, St. Petersburg and N. Novgorod, launched new editions in Samara and Perm. New regional newspapers were launched by Provincia and Pronto-Moskva. The number of colour newspapers is growing. In 2003 the number of inserted titles increased by 62% (compared with 2002), and the overall circulation of inserts increased by 40% to 20 million. Two thirds of the insert market is controlled by three publishing houses – Kommersant (*Kommersant*), Independent Media (*Vedomosti* and *The Moscow Times*) and Prof-Media (*Izvestia*, *Komsomolskaya Pravda*, *Sovietskiy Sport*).

Newspaper launches/closures

Attempts were made to develop the market for evening newspapers in St. Petersburg and Moscow. Launched in 2003: colour daily *Russkiy Courier* (Moscow), in May. Closed in 2003: colour popular daily newspaper *Den'* (Moscow), weekly *Konservator* (former *Obschaya Gazeta*), newspaper *Molodoy* (Moscow).

Advertising

According to the Russian Association of Communication Agencies (RACA), the advertising market grew by 31% in 2003, reaching US\$2.6 billion and taking Russia to leadership in Eastern Europe. Television is the largest segment; printed media is the second largest, with a 28% share of expenditure compared to 22% in 2002. In 2003 newspaper advertising expenditure grew by 17%, but RACA expects growth to decline over the next few years.

Russian advertisers accounted for 62% of spending in 2003. Regional advertising accounted for 28%, compared to 26% in 2002.

Circulation

No official circulation figures are available for Russia except

for several leading publishers registered with the National Circulation Service. According to estimates, there are nearly 7,000 regularly published newspapers of different categories (national, regional, city, local; advertising, corporate, etc.) printed in Russia, with an estimated total circulation of about 22 million.

Online/digital publishing

There are over 1,100 electronic versions of periodicals officially registered in Russia. The overlap of online and "paper" audiences is usually not more than 10%-25%. Revenues of online versions come from advertising and are not sufficient to cover operation costs. Since online payment technologies are underdeveloped in Russia, the yield of online media is very low. However, experts forecast rapid growth in this segment in the next two to three years.

Ownership

The Prof-Media holding company acquired 35% of shares in PH Independent Media, which was formerly owned by VNU. This deal marks the beginning of the process of consolidation in Russia. In 2003 consolidation mostly took place in the magazine market, but it is expected to extend to newspapers soon.

Media/press laws

The Federal Law "On mass media" is being revised. The main aim of this revision is to clarify issues of ownership, rights and obligations of mass media. The new draft includes some innovations caused by the need to resist extremism and terrorism. The draft also assumes extension of broadcasting licenses from five to 10 years. New articles are introduced concerning re-registration, termination and suspension of licences.

The draft law includes the notion of media owner and specifies rights and obligations of media owners with regard to creativity and management. According to the draft, foreign individuals and legal bodies cannot own more than 50% of charter capital in TV and radio stations.

The draft includes a clause obliging journalists to "reject assignments if they assume violations of the law".

The new draft assumes compulsory re-registration of all media within one year of the adoption of the new law. The draft includes a clause limiting state financing of printed media.

Distribution

Publishers cannot easily influence distributors (both retail and subscription). This leads to constant collisions between publishers and distributors and raises market entry barriers for newcomers.



POPULATION

Population by age and sex

	All individuals		Male		Female		Households 000
	000	%	000	%	000	%	
0-9	13,300	9	6,800	10	6,500	8	40,053
10-19	23,200	16	11,800	17	11,400	15	
20-29	22,100	15	11,100	16	11,000	14	
30-39	20,100	14	9,900	15	10,200	13	
40-49	24,200	17	11,600	17	12,600	16	
50-59	15,400	11	7,000	10	8,400	11	
60-69	14,300	10	5,700	8	8,600	11	
70-79	9,800	7	3,100	5	6,700	9	
65+	2,700	2	500	1	2,200	3	
Total	145,100	100	67,500	100	77,600	100	

Source: GosKomStat, Population Census Results, 2002

Housewives (co-habiting persons)

	Housewives	
	000	%
under 25	505	18.9
25-34	1,169	43.7
35-44	668	25.0
45-54	324	12.1
55+	10	0.4
Total	2,677	100

Source: TNS Gallup Media, National Readership Survey, May-October 2003

Population by social class

	Adults		Males		Females	
	000	%	000	%	000	%
Executives	4,422	8	2,833	12	1,589	5
Specialists	6,584	12	2,684	11	3,900	13
White-collar	6,633	12	2,135	9	4,498	15
Blue-collar	13,167	25	8,587	36	4,580	16
Students	4,526	9	2,242	9	2,284	8
Retired	12,091	23	3,819	16	8,273	28
Unemployed	2,226	4	1,426	6	800	3
Housewives	3,098	6	18	0	3,080	11
No response	413	1	226	1	187	1
Total	53,161	100	23,969	100	29,191	100

Source: TNS Gallup Media, National Readership Survey, May-October 2003

Note survey is limited to about half the adult population

Households

Occupancy	Adults	
	000	%
1 person	4,730	9
2 people	11,522	22
3 people	13,901	26
4 people	14,461	27
5 or more people	8,546	16
without children	23,345	44
with children	29,816	56
with children aged 0-2	4,437	8
with children aged 3-9	9,479	18
with children aged 10-15	13,670	26
Total	53,161	100

Source: TNS Gallup Media, National Readership Survey, May-October 2003

Age structure of readership

Age	% of readership	% reach within age group
16-24	14.9	5.8
25-34	18.8	7.0
35-44	23.5	7.6
45-54	19.3	7.2
55-64	13.6	7.1
65+	9.9	4.6

Source: TNS Gallup Media, National Readership Survey, May-October 2003

Newspaper reach (%)

	Daily
Men	6.6
Women	8.1
MHS	6.4

Source: TNS Gallup Media, National Readership Survey, May-October 2003
MHS: Main Household Shopper

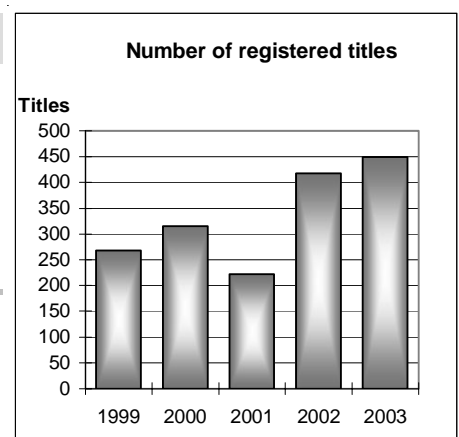
NUMBER OF TITLES AND CIRCULATION

	1999	2000	2001	2002	2003	Change (%)	
						99/2003	2002/03
Number of titles							
Total dailies	268	315	222	418	449	67.54	7.42
National dailies	18	18	16	18	23	27.78	27.78
Regional & local dailies	268	315	222	418	428	59.70	2.39
Free dailies	-	-	-	-	21	-	-
Total non-dailies	8,285	10,188	12,854	15,393	17,949	116.64	16.60
National non-dailies	3,346	4,072	4,762	5,530	6,227	86.10	12.60
Regional & local non-dailies	8,285	10,188	12,854	15,393	17,842	115.35	15.91
Free non-dailies	-	-	-	-	107	-	-

Source: RF Ministry of Mass Media and Information

There is no official data on newspaper circulation in Russia. No regular monitoring is conducted in the regions; the circulation audit service is still very weak and does not provide comprehensive information for most titles.

According to Ministry of Mass Media estimates, the total circulation of all newspapers printed in 2003 was approximately 8.2 billion. A third of sales were of national titles, a third were of regional titles, and the rest were of city, district and local titles.





MORE FACTS

	2003
Advertising revenues (US\$ million)	
Dailies	107.7
Non-dailies	107.2
Volume of advertising sold (A2 pages & page equivalents)	
Total	11,569
Colour	4,737

Source: TNS Gallup AdFact

Before discounts

According to the Ministry of Mass Media, revenues from periodical sales in Russia in 2003 totalled US\$1.5 billion. Newspapers accounted for over 55% of the amount. Given the current economic growth rate, sales may reach US\$2 billion by 2005. Retail and subscription copy sales are the main source of revenues for at least three quarters of printed media. At the same time the subscription/retail ratio is shifting in favor of retail, and this trend will continue.

Top ten national dailies (2003)

Title	Publisher	Circulation * (000)	Readership ** (000)	Cover Price		Format	Full page rate (US\$)	
				RR	US\$		Mono	Colour
Komsomolskaya Pravda	ZAO Prof Media	712	1,781	5.73	0.20	Tabloid	14,000	-
Izvestia	ZAO Prof Media	235	420	7.15	0.25	Broadsheet	23,650	-
Sovetsky Sport	ZAO Prof Media	117	493	7.85	0.27	Tabloid	6,160	7,084
Kommersant Daily	ZAO PH Kommersant	97	271	8.20	0.28	Broadsheet	25,740	-
Iz Ruk V Ruki	OOO Pronto Moscow	-	2,954	12.10	0.41	Tabloid	3,500	-
Moskovsky Komsomolets	ZAO Redaktsia Gazety MK	-	-	5.89	0.20	Broadsheet	25,100	-
Sport-Express	ZAO Sport Express	-	551	9.38	0.32	Broadsheet	12,700	-
Rossiyskaya Gazeta	ZAO IPC Rossiyskaya Gazeta	-	334	6.32	0.22	Broadsheet ***	14,685	-
Trud	OOO PH Redaktsia Gazety Trud	-	-	5.73	0.20	Broadsheet	18,530	-
Zhizn	PH Zhizn	-	-	5.95	0.20	Tabloid	4,210	-

Source: GIPP, National Circulation Service, TNS Gallup Media, Unicon, MediaGuide

* Column includes only circulation data reported by the National Circulation Service (NCS)

** Average issue readership (AIR) according to TNS Gallup Media

*** Tabloid on Fridays

Top ten publishing companies (2003)

	No. titles	Dailies	Weeklies	Total readership
ZAO PH Prof-Media	108	3 national, 48 regional	3 national, 54 regional	8,976,600
ZAO Argumenty i Fakty	70	-	58 regional, 1 Moscow, 1 national	6,899,600
ZAO Redaktsia Gazety MK	66	1 Moscow	65 regional	3,489,500
OOO Pronto Moskva	84	1 Moscow	83 regional	2,954,200
ZAO Extra M Media	5	-	2 Moscow, 3 regional	1,894,700
ZAO InterMediaGroup	43	2 regional	40 regional, 1 Moscow	824,400
ZAO Sport Express	1	1 national	-	551,000
ZAO PH Ekonomicheskaya Gazeta	9	-	3 national, 6 regional	437,500
ZAO IPC Rossiyskaya Gazeta	4	1 national	3 national	334,300
ZAO PH Kommersant	1	1 national	-	270,800

Source: GIPP, Gallup Media

Top ten advertising categories (2003)

Advertising sector	% of ad revenue
Banking services	9.4
Specialist services	7.2
Auto	6.2
Messages and congratulations	5.6
Trade organisations	4.7
Lotteries	4.2
Classified	3.7
Employment services	3.6
Mobile telecommunications	3.4
Property services	3.1

Source: TNS Gallup AdFact

Type of newspaper sales

No official data is available and it is impossible to make estimates for all of Russia. According to Ministry of Mass Media estimates, subscriptions account for 45% of the distribution of central (national) titles, and 70% of regional titles. For other newspapers, retail sales predominate.

Contribution of types of advertising to total advertising income (%)

	2003
Base type range	65.6
Rubric	19.9
No position	14.1
Insert	0.4

Source: TNS Gallup AdFact

Internet publishing (No. of online editions)

	2002	2003
Total	913	1,329

Source: RF Ministry of Mass Media and Information

This is the total number of registered online periodicals.

About two thirds are electronic versions of newspapers.

Online readership (page impressions per month)

Newspaper		2003
Izvestia	www.izvestia.ru	6,949,316
Komsomolskaya Pravda	www.kp.ru	6,849,071
Moskovskiy Komsomolets	www.mk.ru	3,642,513
Kommersant	www.kommersant.ru	1,934,086
Nezavisimaya Gazeta	www.ng.ru	1,925,573

Source: Rambler Internet Holding



ADVERTISING EXPENDITURE & ECONOMIC DATA

Main economic indicators 1996-2002

	1996	1997	1998	1999	2000	2001	2002
1 US\$=	29.17	Roubles at 2002 rate					
Gross Domestic Product (Roubles billion)							
at current prices	2,146	2,479	2,741	4,767	7,306	9,041	10,863
% change	39.3	15.5	10.6	73.9	53.3	23.7	20.2
at 2002 prices	9,913	9,981	8,645	8,097	10,278	10,469	10,863
% change	-5.7	0.7	-13.4	-6.3	26.9	1.9	3.8
Gross Domestic Product per capita (Roubles 000)							
at current prices	14.5	16.8	18.7	32.7	50.2	62.6	75.2
at 2002 prices	67.1	67.8	59.0	55.6	70.6	72.5	75.2
Population							
Millions	147.7	147.1	146.5	145.6	145.5	144.4	144.4
Consumer Price Index							
2002=100	21.6	24.8	31.7	58.9	71.1	86.4	100.0
% change	47.7	14.7	27.7	85.7	20.7	21.5	15.8
Ad.spend as a % of GDP							
	0.25	0.33	0.46	0.30	0.32	0.43	0.58
Advertising Expenditure Growth (%)							
at current prices	31.3	33.3	-7.1	-56.0	44.3	61.7	50.4
at 2002 prices	-0.2	31.3	22.0	-39.8	36.5	38.1	39.6

Source: IFS, ZenithOptimedia

Advertising expenditure

(US\$ million, in current prices)

	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
Newspapers	280	350	350	190	240	310	380	450	475	485	500
Magazines	170	250	220	70	100	160	220	340	395	440	467
Television	400	550	480	190	270	510	900				
Radio	60	70	80	30	45	70	90				
Cinema	0	0	0	0	3	5	8				
Outdoor	140	180	170	92	165	275	400				
Internet	0	0	0	1	3	6	11				
Total	1,050	1,400	1,300	573	826	1,336	2,009	2,744	3,300	3,638	3,919

Source: 1996-2002 RARA (Russian Association of Advertising Agencies), 2003-2006 ZenithOptimedia

Notes: Includes agency commission, excludes production costs, after discounts

Research

Circulation is audited by: The National Circulation Service (NCS). NCS's auditing service is entirely voluntary. Each title that has had its circulation certified gains the right to print the NCS logo next to its circulation statement, thus confirming the adequacy of circulation data and allowing advertisers to assess the true potential of the title as an advertising vehicle. However, the NCS does not yet have much authority in the publishing market. As of March 1 2004 only 249 newspapers and magazines certified their circulations.

Readership is measured by: TNS Gallup Media
Methodology:

TNS Gallup Media (National Readership Survey – NRS)

This continuous research is based on 45,000 interviews in Moscow and 90,000 interviews in the regions. The research measures readership for around 200 titles in Moscow, 120 national and 800 regional and local newspapers and magazines. Results are supplied quarterly.

Taxes

VAT on: sales 10% advertising 10%
newsprint 10% plant 18%
composition 18%* (standard VAT rate 18%)

* All except publishing and editorial services, for which a 10% VAT is charged.

There is a regional tax on advertising and bill posting of up to 5%.

What is the tax rate on profits for newspapers? The tax rate on profits is 24% (7.5% to the federal budget and 16.5% to the regional budget), for newspapers as well as other private companies.

Are there specific tax concessions for newspaper companies? Tax concessions are provided for by RF Law No. 2124-1 about mass media information and RF Law No. 191-93 on state support of mass media and publishing in the Russian Federation.

Subsidies

Are there subsidies for the purchase of newsprint? There are some reductions on rent for regional and local mass media.

In accordance with the Federal Law On Economic Support of Regional (City) Newspapers '177-FZ dated November 24, 1995, the federal budget annually allocates funds for financial support of 1,950-1,980 newspapers included in the Federal Register of Regional (City) Newspapers. Recent subsidies have totalled:

In 2000 (and December 1999): 208 million roubles

In 2001: 270 million roubles (including 85 million roubles for technical improvements)



In 2002: 224 million roubles (including 20 million roubles for technical improvements)

In 2003: 170 million roubles

Apart from these subsidies, budget funds (40 million roubles in 2003) were allocated each year for support of 'socially significant' publications (such as publications for the handicapped, children and teenagers, and educational and cultural titles).

These funds are used to cover part of the expenses of production and distribution of the publications (such as newsprint, printing, delivery); the amount of subsidy is based on average circulation. Use of these funds is strictly controlled to avoid misappropriation.

The federal budget for 2003 allocates over 267 million roubles for such purposes, including 170 million roubles for support of regional (city) newspapers, 40.3 million roubles for support of socially significant periodicals and 55.8 million roubles for state publications (*Rossiyskaya Gazeta*, *Parlamentskaya Gazeta*, and *Rodina* magazine).

Another 100 million roubles are allocated for the support of printing trades and book publishing under the Culture of Russia federal programme.

Subsidies from the federal budget are received by around 12% of printed titles – primarily small-circulation non-profit periodicals.

The exact amount of subsidies granted to regional titles from local budgets is unknown, but it significantly exceeds the amount of federal subsidies and is not less than US\$145 million a year.

Discounts

on: post 0 rail 0 telephone 0 telegraph 0 telex 0

Discounts for advertising in newspapers vary between 3% and 30% depending of the quality of the title, its circulation and readership. The standard agency discount is 15%. Additional discounts usually range from 5% to 10% and depend on frequency of placement.

Ownership

Does any law exist governing publishing-house ownership, or the registration of shares in newspaper-publishing companies? Yes, Federal Law On Mass Media dated December 12, 1991

Is there any law prohibiting or restricting foreign companies or individuals from owning shares, and in particular, the majority of shares, of domestic daily newspapers? No

Is there any law prohibiting daily newspaper or periodical publishers from operating radio or television stations in the same locality? No

So as to guarantee disclosure and transparency in the capital structure and to avert silent partnerships, is there a law or rule making it possible to determine who actually owns a publishing company? Only the Law on Joint Stock Companies. The new version of the Federal Law on Mass Media is currently under development; it is likely to include clauses relevant to this issue.

Is there an antitrust law limiting concentration in the daily press? No

Is further regulation of media concentration expected? The Federal Law "On mass media" is still being revised.

RWANDA

General economic situation

GDP total US\$8.92 billion; GDP per capita US\$1,142 (purchasing power parity; 2002). Consumer price index 105.5 (2002).

Performance of newspapers vs. other media

Radio Rwanda and Television nationale du Rwanda (TVR) are the only nation-wide media. Radio is by far the most popular medium in the country.

Performance of different types of newspapers

In 2002, there was no daily newspaper published in Rwanda. Apart from the government press (*Imwaho, La Releve*), there are fewer than ten privately-owned weekly newspapers, including *The New Times, Rwanda Herald, Rwanda Newline* and *Umeseso*. They publish in English, French, or Kinyarwanda. Circulation does not exceed 4,000 copies.

Advertising

The government is able to influence the press through its purchase of advertising space; many private publications are financially dependent on this.

Readership

Virtually all readership is concentrated in the Kigali area.

Media/Press Laws

The state continues to monopolize the broadcast media, although a media bill passed in June 2002 paved the way for the licensing of private radio and TV stations.

Source: CIA – *The World Factbook 2003*; Freedom House; US State Department; Reporters Without Borders; BBC News

POPULATION & MORE FACTS

Population by age and sex

	All individuals		Male		Female	
	000	%	000	%	000	%
0-14	3,318	43	1,667	43	1,651	42
15-64	4,277	55	2,128	55	2,149	55
65+	215	3	86	2	129	3
Total	7,810	100	3,881	100	3,929	100

Source: CIA – *The World Factbook 2003*

	1999	2000	Change (%) 99/2000
Non-dailies	11	13	18.18

Source: UNESCO, WAN from public sources

SAINT HELENA

General economic situation

GDP total US\$18 billion (1998); GDP per capita US\$2,400 (purchasing power parity; 1998). Consumer price index 103.2 (1997).

Performance of newspapers vs. other media

Radio Helena provides local news

Performance of different types of newspapers

South Atlantic Remote Territories Media Association (SARTMA) is the media representative for most newspapers produced in the British Overseas Territories in the South Atlantic. Each newspaper associated with SARTMA retains its

own ownership, style and editorial policy. On St. Helena Island, these newspapers include the *St. Helena Government News*, which is owned by the government. Another newspaper not in the SARTMA group is the *St. Helena Herald*. A copy of this weekly costs 0.20 Saint Helenian pounds. There are no daily newspapers on Saint Helena.

State support

The *St. Helena Herald* has received a government grant to set up and continue operation.

Sources: CIA – *The World Factbook 2003*; Commonwealth Press Union; WAN

POPULATION & MORE FACTS

Adult population by age and sex

	All adults		Male		Female	
	000	%	000	%	000	%
0-14	1.5	20	1.0	22	0.5	17
15-64	5.0	67	3.0	67	2.0	67
65+	1.0	13	0.5	11	0.5	17
Total	7.5	100	4.5	100	3.0	100

Source: CIA 2003

	2002
Total national non-dailies	2

Source: WAN from public sources

General economic situation

GDP total US\$339 million; GDP per capita US\$8,692 (purchasing power parity; 2002). Consumer price index 101.7 (2001).

Performance of newspapers vs. other media

The government owns and operates the only television station. The local television station – ZIZ – used to go out on cable and terrestrially. However, after the terrestrial transmitter was destroyed in Hurricane Georges in 1998 it has only gone out on cable. Most of the households with TV (75%) have cable. It is possible to get programming from Antigua and St. Maarten via antenna. Aside from the ZIZ channel, cable TV channels are mainly American, with some others, e.g. BBC World.

The government privatised the government-owned radio station, although the government continued to appoint three of its five board members. Three other stations had been in operation since before the Labour Party came into office in 1995. In addition, three privately owned radio stations received licences and began operating in 2001-02. A radio station in Nevis that operated on AM since 1989 received an FM license but was not yet operating on the new frequency at the end of 2002.

Performance of different types of newspapers

There are no daily newspapers. In 2002, there were three independent weekly newspapers; in addition, each of the major political parties published a weekly or biweekly newspaper. The privately owned *The St. Kitts and Nevis Observer* publishes from Nevis, one of the islands of the twin-island federation. Another independent weekly is *The Leewards Times*. The *Labour Spokesman* is the biweekly published by the St. Kitts-Nevis Trades and Labour Union on St. Kitts. The *Democrat* is the weekly published by the opposition party People's Action Movement on St. Kitts. A copy of each of the weeklies costs 2 East Caribbean dollars. A copy of the *Labour Spokesman* costs 2 EC dollars on Saturday and 1 EC dollar on Wednesday.

Newspapers published outside St. Kitts and Nevis and read in St. Kitts and Nevis include the *Daily Herald* written in English and published by the Caribbean Herald NV on St. Maarten. International news publications are readily available.

Source: CIA – *The World Factbook 2003*; UNESCO; US State Department; Commonwealth Press Union; Freedom House

POPULATION & MORE FACTS

Population by age and sex

	All individuals		Male		Female	
	000	%	000	%	000	%
0-14	12	31	6	32	6	30
15-64	24	62	12	63	12	60
65+	3	8	1	5	2	10
Total	39	100	19	100	20	100

Source: CIA – *The World Factbook 2003*

	2002
Number of titles	
Non-dailies	5
<i>National non-dailies</i>	5

Source: US State Department; WAN from public sources

SAINT LUCIA

General economic situation

GDP total US\$866 million; GDP per capita US\$5,346 (purchasing power parity; 2002). Consumer price index 103 (2001).

Performance of newspapers vs. other media

There are two privately held radio stations, and one partially government-funded radio station, two private television stations and one government-operated television station that began operating in October 2002. In addition, there is a subscription cable television service, which provides programming from a variety of sources, such as

CNN and the BBC.

Performance of different types of newspapers

There are no daily newspapers. The three main newspapers are all privately owned. They are the *Star*, published three times a week, the *Voice*, published twice weekly, and the *Mirror* weekly. The other newspapers include the *Crusader* weekly, the *Vanguard* fortnightly and the *Catholic Chronicle* monthly.

Sources: CIA – *The World Factbook 2003*; US State Department; BBC News; Freedom House

POPULATION & MORE FACTS

Adult population by age and sex

	All adults		Male		Female	
	000	%	000	%	000	%
0-14	51	31	26	33	25	30
15-64	103	64	51	64	52	63
65+	8	5	3	4	5	6
Total	162	100	80	100	82	100

Source: CIA 2003

	2002
Total national non-dailies	6

Source: WAN from public sources

SAINT VINCENT AND THE GRENADINES

General economic situation

GDP total US\$339 million; GDP per capita US\$2,897 (purchasing power parity; 2002). Consumer price index 99.6 (2001).

Performance of newspapers vs. other media

The only television station is privately owned and it operates without government interference. Satellite dishes are popular among those who could afford them. There is a cable system with mainly North American programming that has over 300 subscribers.

There are seven radio stations, one of which is state-owned. The government controls programming and also prohibits call-in shows.

Performance of different types of newspapers

The Herald is the first international daily newspaper published and printed in St. Vincent & the Grenadines. All newspapers

are in English and most are published weekly. There are three major privately owned weeklies, the *News*, *Searchlight* and the *Vincentian*, and numerous smaller, partisan publications.

Advertising

Government advertising, a significant source of revenue, is sometimes withheld from newspapers that are more critical of the government.

Press Council

On September 16, 2002 editors from seven East Caribbean countries met in Barbados to lay the groundwork for an Eastern Caribbean Press Council. During the meeting, the journalists agreed to regulate themselves in accordance with a Code of Ethics, which was adopted in November. Two newspapers in St. Vincent agreed to participate.

Sources: CIA - *The World Factbook 2003*; US State Department; Commonwealth Press Union; WAN from public sources

POPULATION & MORE FACTS

Adult population by age and sex

	All adults		Male		Female	
	000	%	000	%	000	%
0-14	33	28	17	28	16	28
15-64	77	66	40	67	37	65
65+	7	6	3	5	4	7
Total	117	100	60	100	57	100

Source: CIA 2003

Top dailies (2002)

Title	Format	Full page ad rate US\$
		Mono
The Herald	Tabloid	600

	2002
Number of national dailies	1

Source: WAN from public sources

SAMOA

General economic situation

GDP total US\$1 billion; GDP per capita US\$5,587 (purchasing power parity; 2002). Consumer price index 104 (2001).

Performance of newspapers vs. other media

The government operates the sole domestic television station. A satellite-cable system is available in parts of Apia. Television from American Samoa is readily available. Radio is both private and public. There are four private radio stations (one AM and three FM).

Performance of different types of newspapers

Two English-language newspapers and several Samoan-language papers published in Samoa appear regularly. The *Samoa Observer* is one of just four seven-day-a-week dailies in the independent Pacific Islands. (The other three are in Fiji.) In addition, there are three Samoan-language newspapers

published out of Auckland, New Zealand and distributed in Samoa. The government also publishes its own weekly newspaper.

Advertising

In 2002, authorities withdrew all government advertisements from the *Samoa Observer* and threatened to cancel its business licence.

Media/press laws

The law requires journalists to reveal their sources in the event of a defamation suit against them. A 1998 law enables government ministers to use public funds to finance defamation suits, and several have filed lawsuits against the *Samoa Observer*, the independent newspaper.

Source: CIA - *The World Factbook 2003*; Freedom House; PANPA Bulletin; US State Department; Australian Press Council

POPULATION & MORE FACTS

Population by age and sex

	All individuals		Male		Female	
	000	%	000	%	000	%
0-14	53	30	27	26	26	35
15-64	115	64	72	69	43	57
65+	11	6	5	5	6	8
Total	179	100	104	100	75	100

Source: CIA - *The World Factbook 2003*

Top daily (2002)

Title
Samoa Observer

Source: BBC News

	2003
Number of titles	
Total dailies	1
National dailies	1

Source: WAN from public sources

General economic situation

GDP total US\$940 million; GDP per capita US\$33,571 (purchasing power parity; 2001). Consumer price index 103.3 (2001).

Performance of newspapers vs. other media

State-sponsored San Marino RTV operates both a radio and television station. Radio Titano is the country's sole privately owned radio station. Italian television broadcasts are available

throughout the country.

Performance of different types of newspapers

The government, some political parties, and trade unions all publish newspapers. Italian and foreign newspapers are widely available.

Source: CIA - The World Factbook 2003; Freedom House

POPULATION & MORE FACTS

Population by age and sex

	All individuals		Male		Female	
	000	%	000	%	000	%
0-14	4	14	2	15	2	13
15-64	19	68	9	69	10	67
65+	5	18	2	15	3	20
Total	28	100	13	100	15	100

Source: CIA - The World Factbook 2003

	2002
Number of titles	
Total dailies	3
<i>National dailies</i>	3

Source: WAN from public sources

Top dailies (2002)

Title
La Tribuna Sanmarinese
Nuovo Corriere di Informazione Sanmarinese
San Marino Oggi

Source: WAN from public sources

SAO TOME AND PRINCIPE

General economic situation

GDP total US\$200 million; GDP per capita US\$1,136 (purchasing power parity; 2002). Consumer price index 109 (2002).

Performance of newspapers vs. other media

Television and radio were state operated. While there were no independent local stations, no laws forbade them. The Voice of America, Radio International Portugal, and radio France International were rebroadcast locally.

Performance of different types of newspapers

There is one daily newspaper: *Tela Non - Diario de Sao Tome e Principe*. It is written in Portuguese. Two government-run and six independent newspapers and newsletters are published sporadically, usually on a monthly or bimonthly basis.

Media/press laws

The law grants all opposition parties access to the state-run media, including a minimum of three minutes per month on television.

Source: CIA - The World Factbook 2003; US State Department

POPULATION & MORE FACTS

Population by age and sex

	All individuals		Male		Female	
	000	%	000	%	000	%
0-14	84	48	43	49	41	46
15-64	85	48	41	47	44	49
65+	7	4	3	3	4	4
Total	176	100	87	100	89	100

Source: CIA - The World Factbook 2003

	2002
Number of titles	
Total dailies	1
<i>National dailies</i>	1

Source: WAN from public sources

Top daily (2002)

Title	Language
Tela Non - Diario de Sao Tome e Principe	(in Portuguese)

Source: WAN from public sources

POPULATION & MORE FACTS

Population by age and sex

	All individuals		Male		Female		Households 000
	000	%	000	%	000	%	
0-14	9,971	42	5,087	39	4,884	46	2,976
15-64	12,890	55	7,493	58	5,397	51	
65+	653	3	363	3	290	3	
Total	23,514	100	12,943	100	10,571	100	

Source: CIA

Top dailies (2001)

Title	Circulation (000)	Readership (000)	Full page rate (US\$)	
			Mono	Colour
Ashraq Al Awsat	246	2,476	13,440	-
Okaz	125	1,588	9,045	12,437
Al Riyadh	121	1,084	8,320	13,312
Al Hayat	98	785	9,565	16,739
Arriyadiyah	97	1,580	7,707	-
Al Jazira	85	734	7,451	9,314
Al Madina	60	666	7,915	11,782
Arab News	52	254	8,320	-
Al Youm	40	453	7,915	11,081
Saudi Gazette	37	105	5,867	8,800

Source: PARC

Top ten advertising categories (2001)

Advertising sector	Newspaper expenditure US\$ (000)
Retail	31,000
Vehicles	28,759
Government ads	25,673
Financial services	22,146
Publishing/media	22,008
Community/public services	11,913
Entertainment	8,677
Toiletries	6,739
Dairy products	5,825
Health & hygiene	1,994

Source: PARC

Top ten advertisers (2001)

Advertiser	Newspaper expenditure US\$ (000)
Toyota	3,783
Chevrolet	1,848
Nissan	1,741
Al Wasat	1,203
LG	1,102
Lexus	1,088
Mitsubishi	1,051
GMC	956
Samsung	907
Showtime	846

Source: PARC

Top publishing companies (2001)

Saudi Research & Publishing Co.
Tihama
Okaz Group
Al Yamamah

Source: ZenithOptimedia

ADVERTISING EXPENDITURE & ECONOMIC DATA

Main economic indicators 1996-2002

	1996	1997	1998	1999	2000	2001	2002
1 US\$=	3.75						
	Riyals at 2002 rate						
Gross Domestic Product (Riyals billion)							
at current prices	591	618	547	604	707	686	706
% change	23.4	4.6	-11.5	10.4	17.1	-2.9	2.8
at 2002 prices	570	595	529	593	700	683	706
% change	22.0	4.5	-11.1	12.1	18.0	-2.5	3.4
Gross Domestic Product per capita (Riyals 000)							
at current prices	33.5	33.9	28.9	30.3	33.9	32.6	33.6
at 2002 prices	32.4	32.6	28.0	29.8	33.6	32.5	33.6
Population							
Millions	17.6	18.2	18.9	19.9	20.9	21.0	21.0
Consumer Price Index							
2002=100	103.7	103.8	103.3	101.7	100.9	100.5	100.0
%change	1.2	0.1	-0.5	-1.5	-0.8	-0.4	-0.5
Ad.spend as a % of GDP							
	0.31	0.39	0.54	0.53	0.53	0.73	0.86
Advertising Expenditure Growth (%)							
at current prices	16.8	31.5	23.1	8.4	17.5	32.5	22.2
at 2002 prices	15.4	31.3	23.7	10.1	18.5	33.0	22.8

Source: IFS, ZenithOptimedia

Advertising expenditure (US\$ millions, in current prices)

	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
Newspapers	191	218	237	238	276	312	356	370	385	401	427
Magazines	101	101	103	98	103	169	181	173	174	175	186
Television	146	277	411	482	583	822	1,026				
Radio	13	11	9	11	17	20	25				
Outdoor	38	36	29	27	27	10	41				
Total	488	641	789	856	1,006	1,333	1,629	1,541	1,614	1,737	1,857

Source: 1996-2002 PARC 2003-2006 ZenithOptimedia

Notes: Includes pan-Arabian advertising, most of which is aimed at Saudis
Before discounts, includes commission, excludes production and classified

General economic situation

GDP total US\$15.64 billion; GDP per capita US\$1,478 (purchasing power parity; 2002). Consumer price index 103 (2002).

Performance of newspapers vs. other media

Radio remains the most important medium of mass information and the main source of news for citizens outside urban areas. In 2002, there were 20 privately owned radio stations in the country. Of these, 15 are regular commercial enterprises, and the other 5 noncommercial "community" radio stations, set up by communities to broadcast community information and news on a variety of topics. There are also three international stations that rebroadcast within the country. All of the locally owned stations broadcast national news and political commentary.

A government monopoly controls local television. While there are no privately owned domestic television stations, French-owned pay TV is available but offers no local news. At the beginning of 2002, the communication minister announced the end of the state monopoly on television and the advent of new, private-sector television channels. In May 2002, the communication ministry was abolished and the general secretary of the government was given responsibility for the information and new technology sector. The president has repeatedly stated he intends to take press and information out of the state's hands.

Performance of different types of newspapers

There are more than 10 daily newspapers and a plethora of weeklies and fortnightlies. Foreign newspapers are sold at

newsstands as well as by street paper-boys of the capital city; supply is scarce outside Dakar.

Circulation

At the beginning of 2002, a shortage of newsprint forced most titles to reduce their pagination and their print run, which affected circulations. For a while some dailies' circulation dropped from 15,000 to 3,000 copies.

Readership

Because of high single-copy prices (roughly equivalent to the price of a kilogramme of rice), many consumers perceive newspapers to be a luxury good and opt instead to buy necessities. In 1999, an estimated 60% of Dakar's readers were borrowing the newspapers they read, rather than purchasing them.

Ownership

Although Senegal is secular by law, Islamic religious fraternities have extended their reach to media ownership, with some of Senegal's largest media companies, such as the Wal Fadjri Group, now partially or entirely owned by prominent spiritual leaders or groups.

Media / Press Laws

A restrictive press law that prohibits 'discrediting of the state' and disseminating 'false news' has been used to prosecute a number of journalists.

Sources: CIA - The World Factbook 2003; US State Department; Freedom House; Reporters Without Borders; Committee to Protect Journalists; International Journalists' Network; WAN from public sources

POPULATION & MORE FACTS

Population by age and sex

	All individuals		Male		Female	
	000	%	000	%	000	%
0-14	4,620	44	2,330	45	2,290	43
15-64	5,637	53	2,707	52	2,930	54
65+	323	3	157	3	166	3
Total	10,580	100	5,194	100	5,386	100

Source: CIA - The World Factbook 2003

Top ten dailies (2002)

Title	Publisher	Circulation (000)
Le Soleil	SSPP Le Soleil, SA (state-owned)	22*
Sud Quotidien	Sud Communications	-
L'Info	Groupe Com 7	-
Wal Fadjri - L'Aurore	-	12**
Le Matin	-	-
Le Populaire	-	-
L'Observateur	Futurs Medias	-
Le Quotidien	Avenir Communication Sa	-

Source: WAN from public sources

* in 1999

** in 2000

SERBIA-MONTENEGRO

POPULATION

Population by age and sex (Serbia)

	All individuals		Male		Female		Households 000
	000	%	000	%	000	%	
Children	1,270	17	652	18	618	16	2,442
16-24	915	12	467	13	448	12	
25-34	981	13	491	13	490	13	
25-44	1,018	14	504	14	514	13	
45-54	1,193	16	591	16	602	16	
55-64	833	11	394	11	439	11	
65+	1,288	17	547	15	741	19	
Total	7,498	100	3,646	100	3,852	100	

Source: Population Census 2002, Official Statistics

Population by social class and sex

	All adults		Male		Female	
	000	%	000	%	000	%
A+B	393	7	228	8	165	5
C1	503	9	211	8	292	10
C2	1,095	19	690	25	405	13
D	1,259	22	719	26	540	18
E	2,507	44	906	33	1,601	53
Total	5,757	100	2,754	100	3,003	100

Source: LSMS 2003, SMMRI (for Ministry of Social Affairs)

A= Employed (officially)

B= Work but are not officially employed

C1= Employer (owner/co owner of the company or store)

C2= Individual farmer

D= Freelancer, lawyer, artist

E= Pensioners (have incomes from rents or receives support)

Households

	Households	
	000	%
1 person	426	17
2 people	603	25
3 people	483	20
4 people	530	22
5 people or more	399	16
without children	1,733	71
With children	709	29
with children aged 0-3	182	7
with children aged 4-9	323	13
with children aged 10-15	303	12
Total	2,442	100

Source: LSMS 2003, SMMRI (for Ministry of Social Affairs)

Children are defined as under 16 years of age

Housewives (co-habiting persons)

	Housewives	
	000	%
Under 25	18	3
25-34	46	7
35-44	53	9
45-54	100	16
55-64	120	20
65+	277	45
Total	614	100

Source: LSMS 2003, SMMRI (for Ministry of Social Affairs)

Newspaper reach * (%)

	Daily
All adults	42.4
Men	48.9
Women	35.8

Source: SMMRI, PrintADEX

* Total reach 71.5% (18.5% do not read dailies at all)

Age structure of readership

Age	% of readership	% reach within age group
12-19	8.1	17.1
20-29	20.1	42.6
30-39	20.8	44.0
40-49	24.9	52.7
50-65	26.2	55.6

Source: SMMRI, PrintADEX

NUMBER OF TITLES AND CIRCULATION

	2002
Number of titles	
Dailies	29
Non-dailies	578
Circulation (000)	
Dailies	1,015
Non-dailies	4,046
Total annual sales (millions of copies)	
Dailies	293
Non-dailies	75



MORE FACTS

Media consumption (minutes per day)

Adults	2002
All newspapers	30
Magazines	60
Radio	121
Television	180
Internet	60

Source: IREX-SMMRI (Serbian Readership Survey, median value)

Employment

	2002
Total no. of employees	7,185

Source: Media Landscape of South East Europe 2002

	2002
Sales revenues (million dinars)	
Dailies	4,400
Non-dailies	3,000

Top ten advertising categories (2003)

Advertising sector	% of display ad revenue
Services	13.5
Telecommunications	7.6
Transport	7.5
Computers	7.4
Cosmetics	6.9
Banks/insurance	6.7
Retail	5.7
Pharmaceuticals	5.1
Media	5.1
Other	13.5

Source: SMMRI, PrintADEX

Top ten advertisers (2003)

Advertiser	% of newspaper expenditure
Telekom Serbia	4.1
Mobtel	2.1
Hot Line 041	1.5
Beiersdorf AG Hamburg	1.3
DIN Tobacco Factory NIS	1.2
Zepter	1.1
HP	1.1
Procter & Gamble	1.1
RTV B92	1.0
Bioclinica Medosan	0.9

Source: SMMRI, PrintADEX

Top ten dailies (2003)

Title	Circulation (000)	Readership (000)
Vecernje novosti	200	893
BLIC	120	602
Politika	90	255
Kurir	70	192
Glas	50	97
Sportski zurnal	40	56
Dnevnik - Novi Sad	20	52
Politika Ekspres	16	33
Balkan	15	30
Danas	15	27

Source: SMMRI

ADVERTISING EXPENDITURE & ECONOMIC DATA

Advertising expenditure by medium (%)

	1998	1999	2000	2001	2002	2003
Newspapers	3	3	4	4	5	19
Magazines	3	4	4	7	7	
Television	78	75	73	71	72	66
Radio	5	6	6	5	5	4
Other	11	12	13	13	11	12

Source: AGB SR, SMMRI (estimated)

SEYCHELLES

General economic situation

GDP total US\$626 million; GDP per capita US\$7,825 (purchasing power parity; 2002). Consumer price index 100.5 (2002).

Performance of newspapers vs. other media

The government has a near-monopoly of the media, owning the only television and radio stations – the most important means for reaching the public.

Performance of different types of newspapers

The government owns the only daily newspaper, the *Seychelles Nation*. While both opposition parties published an assortment of newsletters and magazines, only one significant opposition newspaper – the weekly *Regar* – was published.

Media/press laws

In 2002, the licence fees for a private radio or television station were US\$151,200 (SR800,000) per year, while newspaper publishing licences were US\$760 (SR4,000) plus a bank guarantee of US\$19,000 (SR100,000). High licensing fees have discouraged the development of privately owned broadcast media.

Civil libel lawsuits resulting in steep monetary penalties have been used repeatedly against the independent media. Government officials have sued the weekly *Regar* for libel 10 times in at least six years.

Sources: CIA – *The World Factbook 2003*; US State Department; Freedom House

POPULATION & MORE FACTS

Population by age and sex

	All individuals		Male		Female	
	000	%	000	%	000	%
0-14	22	28	11	28	11	27
15-64	53	66	26	67	27	66
65+	5	6	2	5	3	7
Total	80	100	39	100	41	100

Source: CIA – *The World Factbook 2003*

Top daily (2002)

Title	Publisher	Cover Price	
		Seychelles rupee	US\$
Seychelles Nation	Mayfair Publications (PTY) Ltd.	3.00	0.57

Source: WAN from public sources

	2002
Number of titles	
Total dailies	1
National dailies	1

Source: WAN from public sources

SIERRA LEONE

General economic situation

GDP total US\$2.826 billion; GDP per capita US\$493 (purchasing power parity; 2002). Consumer price index 101 (2001). Sierra Leone has been designated the world's poorest country.

Performance of newspapers vs. other media

Due to low levels of literacy and the relatively high cost of newspapers and television, radio remained the most important medium of public information.

Performance of different types of newspapers

Since 1997, the number of newspapers has mushroomed from 12 to more than 50. They are published in Freetown, covering a wide spectrum of interests and editorial opinion. Most of the newspapers are independent of the government, and several are associated with opposition political parties. In 2002, the number of newspapers fluctuated weekly. Many contained sensational, undocumented stories and repeated items carried by other newspapers. All newspapers are published in English; the Cri language is largely unwritten, which further limits sales in a nation which is 85% illiterate. Many newspapers are funded by political groups.

Newspaper launches/closures

The private daily newspaper *African Champion*, which is headquartered in the capital, Freetown, was suspended for

two months by the Independent Media Commission (IMC).

Circulation

All newspapers are tabloids, most in editions of four to eight pages. All newspapers are printed in Freetown at either of two production centres, both flatbed and prone to mechanical failure. The bulk of newspaper titles are produced on the older of the two, because the newer and better can only handle five newspapers a night.

All cover prices are identical – 500 Leones (about 30 US cents) – and are adjusted by common consent on the same day to avoid market disadvantage.

Ownership

From 2004, foreign companies will be free to compete for readers and advertisers.

Media/Press Laws

In February 2002, the Independent Media Commission (IMC) instituted a US\$2,000 (4 million Leones) annual license fee for single channel radio stations. The IMC threatened to close any radio station that did not pay the fee. At year's end, no stations had been closed.

The IMC regulated independent media outlets. Although it was an independent body, some media observers alleged that



the government influenced it.

Distribution

Members of the Sierra Leone News Vendors' Association (SLNVA) hawk sales in bundles of up to 12 newspapers daily from Monday to Friday. There are no weekend publications,

and few publish five days a week. SLNVA is powerful in its own right, and has refused to sell copies of a paper whose editorial content it disagrees with.

Sources: CIA – *The World Factbook 2003*; US State Department; CPU News

POPULATION & MORE FACTS

Adult population by age and sex

	All adults		Male		Female	
	000	%	000	%	000	%
0-14	2,570	45	1,259	45	1,311	44
15-64	2,979	52	1,421	51	1,558	53
65+	184	3	89	3	95	3
Total	5,733	100	2,769	100	2,964	100

Source: CIA 2003

Top dailies (2002)

Title	Publisher	Circulation * (000)	Cover price		Format
			Leone	US\$	
For Di People	-	4.5	300	0.14	Tabloid (4 pages)
Independent Observer	-	4	300	0.14	Tabloid (4 pages)
The Democrat	-	4	300	0.14	Tabloid (4 pages)
Concord Times	Concord Times Newspaper Ltd	3.5	300	0.14	Tabloid (4 pages)
Awoko	-	-	-	-	Tabloid
Standard Times	-	-	-	-	Tabloid
African Champion	-	-	-	-	Tabloid
The Salone Times	-	-	-	-	Tabloid

Source: *Sierra Leone Media Directory 2001* by the International League for Human Rights and the Center for Media, Education and Technology, WAN from public sources

* 2001 data

Due to a lack of available data, the majority of charts in this entry have not been updated since the 2002 edition of World Press Trends. Those that have not been updated clearly state the year to which the data relates.

POPULATION

Adult population by age and sex (2002)

	All adults		Male		Female		Households 000
	000	%	000	%	000	%	
15-24	518	17	259	17	259	17	998
25-34	666	22	333	22	333	22	
35-44	727	24	379	25	348	23	
45-54	568	18	290	19	278	18	
55+	598	19	284	18	314	20	
Total	3,077	100	1,545	100	1,532	100	

Source: AC Nielsen Media Index

Ethnic distribution (2002)

Group	%
Chinese	76.7
Malay	14.0
Indian	7.9
Other	1.4

Adult population by social class (2002)

	All adults		Male		Female	
	000	%	000	%	000	%
AB	710	23	491	32	219	14
C1	529	17	183	12	346	23
C2	332	11	306	20	26	2
D	291	9	148	10	143	9
E	34	1	34	2	0	0
F	1,177	38	380	25	797	52
Total	3,073	100	1,542	100	1,531	100

Source: AC Nielsen Media Index

AB = professionals, managers, executives, businessmen

C1 = white collar

C2 = skilled/semi-skilled blue collar

D = unskilled blue collar

E = national service

F = full-time housewives, students, retired, unemployed

Full-time housewives (2002)

	Housewives
	000
under 25	7
25-34	83
35-44	134
45-54	119
55+	212
Total	555

Source: AC Nielsen Media Advisor

Newspaper reach (% - 2002)

	Daily
All adults	87
Men	90
Women	84
MHS	85

MHS = Main Household Shopper

Source: AC Nielsen

Households (2002)

Occupancy	Households 000
1 person	25
2 people	175
3 people	159
4 people	301
5 or more people	338
without children	538
with children	460
with children aged 0-3	108
with children aged 4-14	425
Total	998

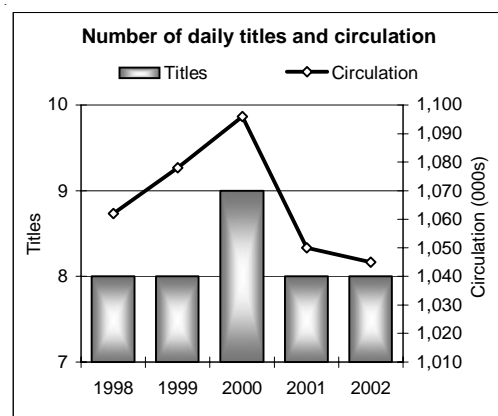
Source: AC Nielsen Media Advisor

Age structure of daily readership (2002)

Age	% of readership	% reach within age group
15-24	16.3	84.4
25-34	21.4	86.3
35-44	24.4	90.0
45-54	19.1	89.9
55+	18.8	84.1

NUMBER OF TITLES AND CIRCULATION

	1998	1999	2000	2001	2002	Change (%)	
						98/2002	2001/02
Number of titles							
Total dailies	8	8	9	8	8	0.00	0.00
Non-dailies	2	2	3	2	2	0.00	0.00
Sundays	6	7	7	7	7	16.67	0.00
Free papers	-	-	1	1	1	-	0.00
Circulation (000)							
Total dailies	1,062	1,078	1,096	1,050	1,045	-1.60	-0.48
Non-dailies	63	69	115	95	99	57.14	4.21
Sundays	959	1,091	1,088	1,057	1,062	10.74	0.47
Free papers	-	-	238	250	280	-	12.00
Total annual sales (millions of copies)							
Dailies	326	332	342	326	327	0.38	0.34
Non-dailies	3	4	5	5	4	35.08	-6.40
Sundays	50	53	55	55	56	12.62	1.52
Free papers	-	-	-	61	57	-	-6.78





MORE FACTS

Top dailies (2002)

Title	Publisher	Circulation (000)	Readership (000)	Cover price		Format	Full page rate (S\$)	
				S\$	US\$		Mono	Colour
The Straits Times (E)	Singapore Press Holdings	385	1,323	0.60	0.34	Broadsheet	16,101	26,001
Streets (E)	Singapore Press Holdings	280	324	free	free	Tabloid	3,465	5,865
Lianhe Zaobao (C)	Singapore Press Holdings	188	668	0.65	0.36	Broadsheet	11,660	19,160
Lianhe Wanbao (C)	Singapore Press Holdings	130	550	0.60	0.34	Broadsheet	6,264	9,264
The New Paper (E)	Singapore Press Holdings	123	506	0.60	0.34	Tabloid	2,495	4,895
Shin Min Daily News (C)	Singapore Press Holdings	118	398	0.60	0.34	Broadsheet	4,752	7,752
Berita Harian (M)	Singapore Press Holdings	62	262	0.40	0.22	Broadsheet	3,672	7,122
Business Times (E)	Singapore Press Holdings	30	99	0.85	0.47	Broadsheet	5,024	7,624
Tamil Murasu (T)	Singapore Press Holdings	8	38	0.50	0.28	Broadsheet	2,592	4,592

Source: AC Nielsen

Top ten advertising categories (2002)

Advertising sector	Share of display ad revenue (%)
Services	40.8
Agriculture, industry & commerce	17.3
Retail	12.5
Entertainment	6.0
Auto	5.3
Luxury items	4.9
Household goods	3.0
Household equipment & appliances	2.6
Congratulatory/announcements	2.0
Toiletries	1.5

Source: AC Nielsen Adex

Top ten advertisers (2002)

Advertiser	Newspaper ad expenditure S\$ (000)
SPH Mediaworks	15,372
Far East Organization Centre	11,681
Starhub	10,623
Courts	9,444
Mobileone	9,055
NTUC Fairprice Co-operative	6,951
Singapore Telecom Mobile	6,850
Dell	6,394
Informatics Holdings	6,266
Citibank	6,198

Source: AC Nielsen Adex

Top publishing company (2002)

	Turnover S\$ (mill)
Singapore Press Holdings	903

Internet publishing (No. of online editions)

	2001	2002
Dailies	6	6

Newspaper colour capability & formats

Number of:	1998	1999	2000	2001	2002
4-colour newspapers	8	8	9	9	9
Broadsheets	7	7	8	7	7
Tabloids	1	1	1	2	2

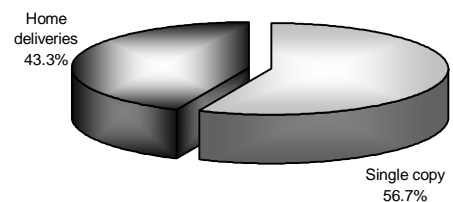
Cover prices (2002)

	S\$
Single copy	0.40-0.85
Subscription	0.40-0.85

Type of newspaper sales (%)

	Single copy	Home deliveries
1998	52.6	47.4
1999	54.9	45.1
2000	55.7	44.3
2001	55.5	44.5
2002	56.7	43.3

Type of newspaper sales in 2002 (%)



ADVERTISING EXPENDITURE & ECONOMIC DATA

Advertising expenditure

(S\$ million, in current prices)

	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
Newspapers	578	647	575	610	751	680	692	671	700	679	723
Magazines	68	64	58	62	68	72	65	81	85	88	90
Television	379	440	434	410	504	557	696				
Radio	65	63	54	62	77	115	130				
Cinema	10	15	15	18	22	22	13				
Outdoor	35	44	49	54	78	96	90				
Total	1,135	1,273	1,185	1,216	1,500	1,541	1,686	1,753	1,841	1,924	2,039

Source: 1996-2002 AC Nielsen/SRS Adex, 2003-2006 ZenithOptimedia

Notes: Excludes production costs, includes agency commission (15%), before discounts, includes some classified advertising ('display classifieds' for banking/finance, cars, leisure/travel & property)



Main economic indicators 1996-2002

	1996	1997	1998	1999	2000	2001	2002
1 US\$= 1.79 S\$ at 2002 rate							
Gross Domestic Product (S\$ billion)							
at current prices	128	140	138	140	158	152	156
% change	8.9	9.4	-1.9	1.8	12.6	-3.6	2.4
at 2002 prices	133	143	140	143	159	151	156
% change	7.4	7.3	-1.6	1.7	11.1	-4.5	2.8
Gross Domestic Product per capita (S\$ 000)							
at current prices	34.9	37.0	35.1	35.5	38.2	36.8	37.7
at 2002 prices	36.2	37.6	35.8	36.1	38.4	36.7	37.7
Population							
Millions	3.7	3.8	3.9	4.0	4.1	4.1	4.1
Consumer Price Index							
2002=100	96.4	98.3	98.0	98.1	99.5	100.4	100.0
% change	1.4	2.0	-0.3	0.1	1.4	1.0	-0.4
Ad.spend as a % of GDP							
	0.89	0.91	0.86	0.87	0.95	1.01	1.08
Advertising Expenditure Growth (%)							
at current prices	7.9	12.2	-6.9	2.6	23.4	2.7	9.4
at 2002 prices	6.4	10.0	-6.6	2.5	21.7	1.7	9.8

Source: IFS, ZenithOptimedia

Research

Circulation is audited by: Media Circulation Services (MCS)

Readership is audited by: AC Nielsen

Methodology: 4,500 face-to-face interviews.

Ownership

Does any law exist governing publishing-house ownership, or the registration of shares in newspaper-publishing companies? Yes.

Newspapers are subject to the Newspaper and Printing Presses Act. No individual may own more than 3% of a newspaper.

Is there any law prohibiting or restricting foreign companies or individuals from owning shares, and in particular, the majority of shares, of domestic daily newspapers? No. The previous 49% limit on foreign ownership has been removed.

Is there any law prohibiting daily newspaper or periodical publishers from operating radio or television stations in the same locality? No

POPULATION

Population by age and sex

	All individuals		Male		Female		Households 000
	000	%	000	%	000	%	
Children	1,102	20	564	22	538	19	1,884
16-24	819	15	418	16	401	15	
25-34	791	15	401	15	390	14	
35-44	778	14	391	15	387	14	
45-54	754	14	369	14	385	14	
55-64	474	9	214	8	260	9	
65+	659	12	255	10	404	15	
Total	5,377	100	2,612	100	2,765	100	

Source: Statistical Yearbook 2002

Housewives

	Housewives	
	000	%
under 25	529	29
25-34	856	47
35-44	286	16
45-54	81	4
55-64	40	2
over 65	40	2
Total	1,832	100

Source: Statistical Yearbook 2001

Working population by social class and sex

	All adults		Male		Female	
	000	%	000	%	000	%
A+B	338	16	135	11	203	21
C1	548	25	191	16	357	37
C2	507	23	402	34	105	11
D	535	25	356	30	179	19
E	234	11	113	9	121	13
Total	2,162	100	1,197	100	965	100

Source: Statistical Yearbook 2001

A = upper middle class/higher managerial, administrative, professional

B = middle class/intermediate managerial, administrative, professional

C1 = lower middle class/supervisory/clerical/junior managerial

C2 = skilled working class/skilled manual workers

D = working class/semi and unskilled manual workers

E = those at lowest levels of subsistence/state pensioners or widows

Households

Occupancy	Households	
	000	%
1 person	161	9
2 people	388	21
3 people	368	20
4 people	547	30
5 or more people	368	20

without children	621	34
with children	1,211	66
Total	1,832	100

Source: Statistical Yearbook 2001

Age structure of readership

Age	% of readership
0-15	36.8
16-24	59.3
25-34	61.5
35-44	63.2
45-54	62.1
55-64	60.0
65+	57.6

Source: Slovak Radio Media Research Department

Newspaper reach (%)

	Daily
	%
All adults	58
Men	68
Women	52

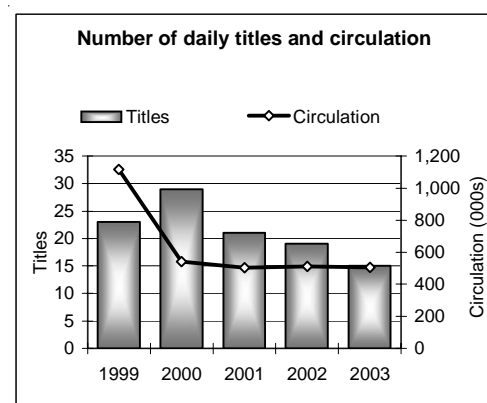
NUMBER OF TITLES AND CIRCULATION

	1999	2000	2001	2002	2003	Change (%)	
						99/2003	2002/03
Number of titles							
Total dailies	23	29	21	19	15	-34.78	-21.05
National dailies	14	12	12	10	11	-21.43	10.00
Regional and local dailies	9	17	9	9	4	-55.56	-55.56
Total non-dailies	2	2	1	-	-	-	-
Sundays[^]	14	-	-	-	-	-	-
Circulation (000) †							
Total dailies	1,116	541	503	512	506	-54.66	-1.17
National dailies	885	468	456	460	461	-47.91	0.22
Regional and local dailies	231	73	47	52	45	-80.52	-13.46
Total non-dailies	15	6	6	-	-	-	-
Sundays	900	-	-	-	-	-	-
Total annual sales (millions of copies)							
Dailies	290.2	137.5	132.0	156.0	154.9	-46.62	-0.71
Total non-dailies	0.8	1.5	1.3	-	-	-	-
Sundays	47	-	-	-	-	-	-

Source: ABC SR

[^] special weekend editions of daily titles

† circulation figures from 2000 onwards are only for audited titles. The new Slovakian Audit Bureau of Circulation was set up in April 2000. 1999 figure is for all titles, based on publishers' claims, and so is not directly comparable.





MORE FACTS

	2000	2001	2002	2003	Change (%)	
					2000/02	2002/03
Advertising revenues (SKK million) *						
Dailies	835	1,035	1,152	1,418	69.82	23.09
Sales revenues (SKK million)						
Dailies	-	-	1,560	1,549	-	-0.71
Non-dailies	-	-	-	-	-	-

Source: TNS A-Connect

Advertising revenues are before discounts. A typical discount is 15%.

* Figures include classifieds and inserts

Type of newspaper sales (%)

	Single copy	Home deliveries	Postal deliveries
1999	70	25	5
2000	70	25	5
2001	70	25	5
2002	-	-	-
2003	65	20	15

Distribution and newsprint costs

	1999	2000	2001	2002	2003
As % of average cover price					
Single copy sales	38	40	38	40	40
Home deliveries	45	45	45	45	45
Postal deliveries	30	30	30	30	30

Average distribution cost per copy

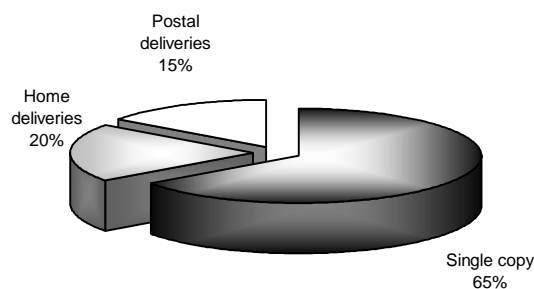
	SKK	1999	2000	2001	2002	2003
Subscription	SKK	3.50	3.80	4.40	4.80	5.00
Single copy	SKK	3.60	3.90	4.00	4.30	4.50

Newsprint costs (average per ton)

	SKK	1999	2000	2001	2002	2003
SKK		20,000	23,000	26,774	24,000	20,000

Source: Slovak Publishers Association

Type of newspaper sales in 2003 (%)



Top ten dailies (2003)

Title	Publisher	Circulation (000)	Readership (000)	Cover Price		Format	Full page rate (SKK)	
				SKK	US\$		Mono	Colour
Nový čas	Vydavateľstvo časopisov a novín	160	980	8.50-12.00	0.20-0.30	Tabloid	101,000	153,000
SME	Petit Press	80	460	10.00-14.00	0.25-0.35	Broadsheet	105,000	137,000
Pravda	Perex	75	400	9.00-13.00	0.23-0.33	Broadsheet	99,000	-
Šport **	Sport Press	55	260	12.00	0.30	Broadsheet	50,000	100,000
Korzár *	Petit Press	33	200	9.50-12.50	0.24-0.31	Broadsheet	66,000	-
Új Szó	Petit Press	28	180	9.50-11.00	0.24-0.28	Broadsheet	66,000	86,000
Hospodárske noviny	Ecopress	22	130	11.00-12.00	0.28-0.30	Broadsheet	90,000	120,000
Národná obroda	Výhra	18	100	10.00	0.25	Broadsheet	55,000	-
Nový deň **	Republika	15	80	10.00	0.25	Broadsheet	-	-
Roľnícke noviny ***	Petit Press	5	20	10.00-14.00	0.25-0.35	Broadsheet	50,000	-

* A chain of 6 regional dailies

** Not audited

*** Changed frequency during the year. Now published as a weekly.

Top ten advertising categories (2002)

Advertising sector	% of display ad revenue
Telecommunications	17.3
Banks	7.3
Insurance	5.3
Cars	4.1
Newspapers/magazines	4.1
Telephone services/games	4.0
Beer	4.0
Political parties	2.9
Light drinks	2.9
Carbonated drinks	2.8

Source: AC Nielsen

Top ten publishing companies (2003)

(ranked by total circulation)

Vydavateľstvo časopisov a novín
Petit Press
Spoločnosť 7 plus
Perex
Euroskop-Ringier
Šport press
Ecopress
TV Tip
Živena
AH-Public

Source: Slovak Publishers Association

Top ten advertisers (2003)

Advertiser	Newspaper expenditure SKK (000)
Orange Slovakia	53,044
EuroTel Bratislava	39,205
Slovenské telekomunikácie	36,157
Slovenská sporiteľňa	31,654
TV Tip	5,888
Unilever Slovensko	3,222
Nestle Foods	2,737
Heineken Slovensko	2,723
Procter & Gamble	75
Perex Bratislava	72

Source: TNS A-Connect

Newspaper colour capability & formats

Number of:	1999	2000	2001	2002
4-colour newspapers	8	8	22	19
Broadsheets	21	28	20	17
Tabloids	2	1	2	2

Online readership (average page impressions per month)

	2002	2003
SME	138,185	208,052
Nový čas	55,758	-
Korzár	9,752	186,638
Pravda	-	103,016
Új Szó	4,269	5,348
Šport	4,175	9,666

Source: Taylor Nelson Sofres



ADVERTISING EXPENDITURE & ECONOMIC DATA

Advertising expenditure (SKK million, in current prices)

	1997	1998	1999	2000	2001	2003
Newspapers	757	980	1,057	1,113	1,103	1,418
Magazines	571	802	798	831	1,376	1,720
Television	3,350	5,068	5,707	6,544	8,967	11,881
Radio	421	511	492	554	741	1,217
Cinema	0	0	0	0	11	541
Outdoor	256	292	334	284	446	1,094
Total	5,355	7,653	8,388	9,326	12,644	17,871

Source: 1997-2001 TNS A-Connect, 2003 TNS A-Connect

Notes: Before discounts, includes classified, excludes production

Main economic indicators 1996-2002

	1996	1997	1998	1999	2000	2001	2002
1 US\$ = 45.33 SKK at 2002 rate							
Gross Domestic Product (SKK billion)							
at current prices	629	709	775	836	909	989	1,074
% change	15.1	12.7	9.4	7.8	8.7	8.9	8.5
at 2002 prices	978	1,039	1,065	1,038	1,008	1,022	1,074
% change	12.4	6.2	2.5	-2.5	-2.9	1.4	5.0
Gross Domestic Product per capita (SKK 000)							
at current prices	117.1	131.7	143.8	154.8	168.3	183.2	198.8
at 2002 prices	182.1	193.1	197.6	192.3	186.7	189.3	198.8
Population							
Millions	5.4	5.4	5.4	5.4	5.4	5.4	5.4
Consumer Price Index							
2002=100	64.3	68.2	72.8	80.5	90.2	96.8	100.0
% change	5.8	6.1	6.7	10.6	12.0	7.3	3.3
Ad.spend as a % of GDP							
	0.29	0.76	0.99	1.00	1.03	1.28	-
Advertising Expenditure Growth (%)							
at current prices	60.5	193.1	42.9	9.6	11.2	35.6	-
at 2002 prices	51.7	176.1	34.0	-0.9	-0.7	26.3	-

Source: IFS, ZenithOptimedia

Research

Circulation is audited by: Audit Bureau of Circulation – Slovak Republic.

Readership is measured by: AISA Slovakia together with Median Prague. AISA is a full service research company providing quantitative and qualitative research within the Slovak and Czech republics. AISA is an NFO WorldGroup company. NFO WorldGroup is one of the leading providers of research-based marketing information and counsel. Note: the National Centre for Media Communications does not exist more.

Methodology:

Operations: quantitative research includes media audience measurement. Qualitative research includes focus groups discussions, in-depth interviews.

Methods: face-to-face and telephone interviews, diaries, postal surveys, home use and central location tests, ad hoc retail audit, mystery shopping, panels, focus groups, in-depth interviews and projective techniques.

Since 2001 the Media Research Department (as a special department of Slovak Radio) carries out regular audience surveys focused not only on radio audience measurement, but also on other patterns of media behaviour of the Slovak population (TV and press audience measurement). It also provides public opinion polls concerned with topical problems of Slovakia.

Products:

- listening patterns and indicators, including ratings of broad stations in 30 minute time blocks from 2001 up to now

- market share (share of broad stations expenditure) from 2001 up to now
- sociodemographic attributes of radio audience
- general media behaviour of population
- preferences and opinions of the Slovak public (political, economical, social questions)

Taxes

VAT on: sales 14% advertising 20%
 newsprint 14% plant 20%
 composition 20% (normal VAT rate 14%/20%)

Newspapers pay 25% tax on profits.

Discounts

on: post 0 rail 0 telephone 0 telegraph 0 telex 0

Ownership

Does any law exist governing publishing-house ownership, or the registration of shares in newspaper-publishing companies? No

Is there any law prohibiting or restricting foreign companies or individuals from owning shares, and in particular, the majority of shares, of domestic daily newspapers? No

Is there any law prohibiting daily newspaper or periodical publishers from operating radio or television stations in the same locality? No

So as to guarantee disclosure and transparency in the capital structure and to avert silent partnerships, is there a law or rule making it possible to determine who actually owns a publishing company? No

Is there an antitrust law limiting concentration in the daily press? No

Due to a lack of available data, the majority of charts in this entry have not been updated since the 2002 edition of World Press Trends. Those that have not been updated clearly state the year to which the data relates.

Commentary – CATI

Slovenia does not yet have an Audit Bureau of Circulation, but there are promising signs that one may emerge eventually. In 2002 the largest publishers, advertisers and advertising agencies reached a consensus and formed a joint body to support and fund the National Readership Survey, which is owned and controlled by the Slovenian

Advertising Chamber. The survey is conducted by CATI and after its first year has become accepted as the benchmark for the market.

Only one daily is a tabloid – *Slovenske Novice* – and this is the most widely read of all Slovenian dailies.

POPULATION

Population by age and sex (2002)

	All individuals		Male		Female		Households 000
	000	%	000	%	000	%	
Children	300	16	154	16	146	15	685
16-24	278	14	143	15	135	14	
25-34	286	15	146	15	140	14	
35-44	306	16	154	16	151	16	
45-54	297	15	153	16	144	15	
55-64	209	11	101	11	108	11	
65+	252	13	107	11	145	15	
Total	1,927	100	959	100	969	100	

Source: Central Population Registry,
Ministry of Interior, 2002 census

Population by social class and sex (1999)

	All adults		Male		Female	
	(%)	%	%	%		
A	3.0	4.3	1.8			
B	9.0	10.9	7.1			
C	11.2	7.1	15.3			
D	36.2	44.2	28.3			
E	24.6	17.2	31.8			
F	16.0	16.3	15.7			
Total	100.0	100.0	100.0	100.0		

Source: CATI Center, Daily Omnibus 1999 (Jan-Dec)

A= managers/employees, income above SIT 150,000/month

B= managers/employees, income up to SIT 150,000/month

C= employees/lower middle class

D= workers/farmers

E= pensioners/housewives/unemployed

F= pupils/students

Newspaper reach (% - 2002)

	Daily	Weekly	Monthly
All adults	45.1	77.7	88.8
Men	49.6	81.5	90.9
Women	40.7	73.9	86.8

Source: National Readership Survey 2002

Age structure of readership (2002)

Age	% of readership	% daily reach within age group
under 16	4.5	27.8
16-24	15.2	45.2
25-34	16.5	48.1
35-44	18.7	46.5
45-54	19.1	47.7
55-64	15.1	46.5
65+	11.0	43.9

Source: National Readership Survey 2002

Households (2002)

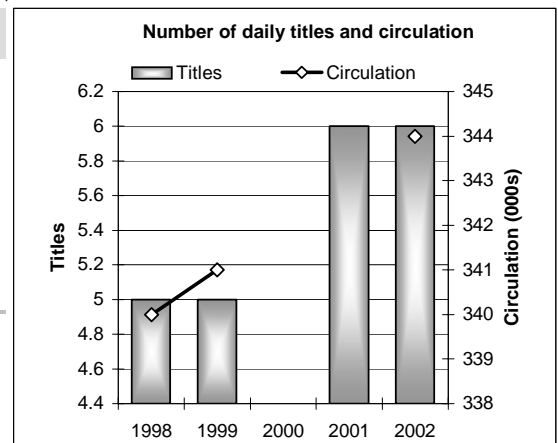
Occupancy	Households 000s
1 person	150
2 people	157
3 people	143
4 people	158
5 or more people	76
without children	158
with children	527
Total	685

Source: Central Population Registry,
Ministry of Interior, 2002 census



NUMBER OF TITLES AND CIRCULATION

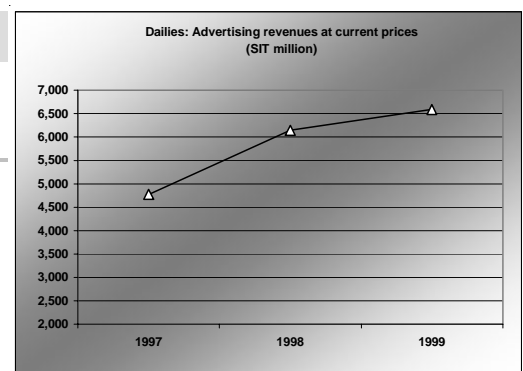
	1998	1999	2000	2001	2002	Change (%)	
						98/2002	2001/02
Number of titles							
Total dailies	5	5	-	6	6	20.00	0.00
<i>National dailies</i>	3	3	-	5	5	66.67	0.00
<i>Regional dailies</i>	2	2	-	1	1	-50.00	0.00
Non-dailies	10	14	-	-	25	150.00	-
<i>National non-dailies</i>	2	6	-	-	-	-	-
<i>Regional non-dailies</i>	5	5	-	-	-	-	-
<i>Local non-dailies</i>	3	3	-	-	-	-	-
Sundays	1	1	-	2	2	100.00	0.00
Free papers	1	1	-	-	1	0.00	-
Circulation (000)							
Total dailies	340	341	-	-	344	1.18	-
<i>National dailies</i>	200	198	-	-	-	-	-
<i>Regional dailies</i>	140	143	-	-	-	-	-
Non-dailies	330	424	-	-	-	-	-
<i>National non-dailies</i>	180	317	-	-	-	-	-
<i>Regional non-dailies</i>	150	107	-	-	-	-	-
Sundays	64	64	-	-	-	-	-
Free papers	640	640	-	-	-	-	-



Source: Mediana

MORE FACTS

	1997	1998	1999	2000	2001	Change (%)	
						1997/99	1998/99
Advertising revenues (SIT million)							
Dailies	4,777	6,145	6,590	-	-	37.95	7.24
Non-dailies	1,657	1,421	1,876	-	-	13.19	31.98
Free papers	-	92	115	-	-	-	24.88



Top publishing companies (2002)

(ranked by total revenue)

- Delo
- Czp Večer
- Dnevnik
- Burda

Media consumption (minutes per day) *

	1995	1996	1997	1998	1999
Newspapers	30	20	8	8	18
Magazines	10	10	3	3	5
Radio	220	270	220	205	188
Television	190	160	180	160	160

Source: IRM

* For individuals aged between 10 and 75

Top dailies (2002)

Title	Publisher	Circulation (000)	Readership (%)	Cover Price		Format	Full page rate (SIT)	
				SIT	US\$		Mono	Colour
Slovenske Novice	Delo	97	294	120	0.50	Tabloid	980,400	1,274,520
Delo	Delo	89	213	160	0.67	Broadsheet	3,879,675	-
Dnevnik	Dnevnik	66	129	160	0.67	Broadsheet	960,000	1,250,000
Večer	Czp Večer	61	159	160	0.67	Broadsheet	984,000	1,284,000
Ekipa	Salomon	21	44	150	0.62	Broadsheet	188,900	252,000
Finance	Finance	10	16	300	1.25	Broadsheet	650,000	650,000

Cover prices (2002)

	SIT
Single copy	120-300
Subscription	85-270

(No. of online editions)

	1998	1999	2000	2001
Dailies	3	3	-	3
Non-dailies	-	1	-	-

Online readership (% reach)

Newspaper	2002
Večer	2.8
Dnevnik	1.6
Delo	1.3



Newspaper colour capability & formats

Number of:	1998	1999	2000	2001	2002
4-colour newspapers	4	4	-	-	6
Broadsheets	4	4	-	-	5
Tabloids	1	1	-	-	1

Employment (dailies only)

	1998	1999	2000	2001	2002
Total no. of Journalists	422	571	-	-	405
Total no. of Employees	1,038	1,342	-	-	970

CROSS MEDIA OWNERSHIP

Owners	Regional TV	National TV	Regional Newspapers	National Newspapers	Radio
Foreign Investors	max. 20%	max. 20%	max. 20%	max. 20%	max. 20%

ADVERTISING EXPENDITURE & ECONOMIC DATA

Main economic indicators 1996-2002

	1996	1997	1998	1999	2000	2001	2002
1 US\$=	240.25	SIT at 2002 rate					
Gross Domestic Product (SIT billion)							
at current prices	2,555	2,907	3,254	3,648	4,222	4,741	5,285
% change	15.0	13.8	11.9	12.1	15.7	12.3	11.5
at 2002 prices	4,032	4,229	4,387	3,353	4,925	5,097	5,285
% change	4.9	4.9	3.7	-23.6	46.9	3.5	3.7
Gross Domestic Product per capita (SIT 000)							
at current prices	1,284	1,461	1,643	1,833	2,122	2,382	2,656
at 2002 prices	2,026	2,125	2,215	1,685	2,475	2,561	2,656
Population							
Millions	2.0	2.0	2.0	2.0	2.0	2.0	2.0
Consumer Price Index							
2002=100	63.4	68.7	74.2	78.8	85.7	93.0	100.0
% change	9.7	8.5	7.9	6.2	8.8	8.5	7.5
Ad.spend as a % of GDP							
	0.68	0.75	0.98	1.12	-	-	-
Advertising Expenditure Growth (%)							
at current prices	45.1	24.2	46.8	28.1	-	-	-
at 2002 prices	32.3	14.5	36.1	20.6	-	-	-

Source: IFS, ZenithOptimedia

Advertising expenditure

(SIT million, in current prices)

	1994	1995	1996	1997	1998	1999
Newspapers	2,413	2,423	2,985	3,353	4,444	4,935
Magazines	2,495	2,902	3,892	4,455	5,780	6,947
Television	3,709	4,389	7,829	11,320	18,156	22,714
Radio	1,540	1,880	2,034	1,730	2,400	4,280
Outdoor	266	471	765	886	1,145	2,020
Total	10,423	12,065	17,504	21,745	31,924	40,897

Source: Mediana, IBO Advertising Expenditure

Notes: Before discounts (includes agency commission, excludes classifieds and production costs).

Research

There is no independent organisation that audits circulation.

Readership is measured by: The National Readership Survey, owned by the Slovenian Advertising Chamber.

Methodology: The survey is undertaken by CATI Marketing, Media and Social Research & Consulting, which conducts about 110 telephone interviews a day with individuals aged between 10 and 75.

Taxes

VAT on:	sales 8.5%	advertising 20%
	newsprint 20%	new equipment 20%
	composition 0	(standard VAT rate 20%)

Like all companies, publishers pay corporation tax at 25%.

Ownership

Does any law exist governing publishing-house ownership, or the registration of shares in newspaper-publishing companies? No individual or company may own more than 33% of a newspaper publisher.

Is there any law prohibiting or restricting foreign companies or individuals from owning shares, and in particular, the majority of shares, of domestic daily newspapers? Like domestic companies, foreign companies may not own more than 33% of a newspaper publisher.

Is there any law prohibiting daily newspaper or periodical publishers from operating radio or television stations in the same locality? Media owners cannot launch TV or radio stations or newspapers, and cannot own over 10% of any in existence.

So as to guarantee disclosure and transparency in the capital structure and to avert silent partnerships, is there a law or rule making it possible to determine who actually owns a publishing company? All individuals or companies owning at least 10% in any company must disclose their interest.

Is there an antitrust law limiting concentration in the daily press? If any publisher controls over 50% of the market, it has to be reported to the authorities.

Is further regulation of media concentration expected? No

General economic situation

GDP total US\$800 million; GDP per capita US\$1,572 (purchasing power parity; 2001). Consumer price index 101.8 (2001).

Performance of newspapers vs. other media

The country's broadcast media consisted of the Solomon Islands Broadcasting Corporation (SIBC), a statutory body that comes directly under the prime minister's office and whose radio broadcasts are heard throughout the country; two other AM stations; and a privately owned FM radio station. Given the high rate of illiteracy, radio broadcasting was more influential than the print media. There is no TV service based in the Solomon Islands, although Australia TV, BBC World and other satellite TV channels can be received.

Performance of different types of newspapers

The country is served by two private newspapers: one – the daily *Solomon Star* – published on weekdays, another – the weekly *Solomon Express* – coming out every Friday. The *Solomon Star*'s circulation ranges between 4,000 and 6,000. In 2002 the *Solomon Express* produced between 1,000 and 2,000 copies. The *Solomon Star* still dominated the market, with outlets at all the provincial centres in the country. The *Solomon Express* was sold mainly in

the capital Honiara. At least two non-governmental organizations (NGOs) published periodic news journals.

Advertising

The print media have been hit hard by a decrease in advertising revenue in 2002. The *Solomon Star*, for example, was forced to cut its number of pages by almost half to conserve funds.

Media/press laws

Armed supporters of a government minister forced the independent daily *Solomon Star* to pay him 'compensation' at Sol\$5,000 (US\$1,000) for publishing an unflattering story in February 2002; in May 2002, SIBC staff were threatened by a group of militants, who also damaged equipment at the radio station.

State support

SIBC – the nation's most popular media outlet – has received none of its designated funding from Parliament for two years in a row, despite repeated requests from SIBC management, and is operating at a loss.

Sources: CIA – *The World Factbook 2003*; Freedom House; Australian Press Council; BBC News; Committee to Protect Journalists

POPULATION & MORE FACTS

Population by age and sex

	All individuals		Male		Female	
	000	%	000	%	000	%
0-14	218	43	111	43	107	43
15-64	275	54	139	54	136	54
65+	16	3	8	3	8	3
Total	509	100	258	100	251	100

Source: CIA - *The World Factbook 2003*

	2002
Number of titles	
Total dailies	1
<i>National dailies</i>	1

Source: WAN from public sources

Top daily (2002)

Title	Circulation (000)	Format
Solomon Star	5	Tabloid

Source: WAN from public sources

General economic situation

GDP total US\$4.270 billion; GDP per capita US\$532 (purchasing power parity; 2001). Consumer price index over 200 (businesses print their own money; 2002).

Performance of newspapers vs. other media

The majority of the country's citizens obtained news from foreign news broadcasts, primarily the British Broadcasting Corporation (BBC), which transmitted a daily Somali-language programme. The government launched its first radio station – Radio Mogadishu – in 2001. The two government-owned radio stations – Radio Mogadishu and Radio Hargeisa – broadcast in Arabic, English, Italian, Somali and some other languages. Private broadcast media have been rejuvenated in the last several years. Some, such as the HornAfrik radio and television stations, provide balanced and independent coverage, but many outlets are linked to the various landlords and political factions.

Performance of different types of newspapers

The print media consisted largely of short, photocopied newspapers, published in the larger cities and often linked to one of the factions. Several of these newspapers nominally were independent. About ten newspapers exist in the two states of Somaliland, in the north-west, and

Puntland, in the north-east. Somaliland has two daily newspapers, one government daily and one independent. There also was the English language weekly newspaper *Riyyaq*.

Readership

Readers of the daily *Ayaamaha* share one copy between five to ten people, or they borrow it from news vendors.

Media/press laws

In May 2002 regional authorities withdrew the broadcasting licence of a company in Puntland, and in June the Somaliland government banned all privately owned radio stations; however, it subsequently permitted a BBC-funded FM station to broadcast.

In October 2002 journalists went on strike to protest against the passing of a harsh new media bill by the parliament. Shortly thereafter, the president refused to sign the bill into law, and at year's end it was being redrafted with assistance from lawyers and journalists.

Sources: CIA – *The World Factbook 2003*; Freedom House; US State Department; ArabNet; Reporters Without Borders; WAN - RAP 21 Newsletter

Population by age and sex

	All individuals		Male		Female	
	000	%	000	%	000	%
0-14	3,595	45	1,802	45	1,793	45
15-64	4,215	53	2,121	53	2,094	52
65+	216	3	94	2	122	3
Total	8,026	100	4,017	100	4,009	100

Source: CIA - *The World Factbook 2003*

Top dailies (2002)

Title	Circulation (000)
El Pais	-
Hurriya (Freedom)	-
Jamhuuriya (The Republic)	3
Xiddigta Oktobar (The October Star)	-
Qaran (Nation)	2
Ayaamaha	1

Source: WAN from public sources

Commentary – Print Media

General situation

The greatest challenge to publishers is the low literacy rate and building a culture of reading among the young. While there are no restrictions on newsprint, the hard currency pricing of newsprint remains an important driver of cost increases.

Performance of newspapers vs. other media

According to the latest research circulation and readership has increased for daily newspapers but has remained static for weeklies. Daily radio listening increased from 3 hours 54 minutes in 2002 to 4 hours 46 minutes in 2003; the increase was mainly between midday to midnight. Despite the fact that the daily television viewing has remained static overall, the distribution of viewers has channels. The number of people watching e-TV (South Africa's independent English television station) continues to grow, while other stations are losing viewers. Cinema attendance is stable. Internet use has grown rapidly and continues to grow, with most access taking place at home. Access outside the home and workplace is declining. Sending and receiving emails is the most important internet activity: in a four-week period 1.347 million adults (4.5% of the total) use the internet to send email, while 1.085 million (3.6%) use it to search for information.

Performance of different types of newspapers

Tabloid growth has lifted the weekend market by 5%, and the daily market by 17%, largely due to the success of *Daily Sun*, *Sunday Sun* and *Son*, which is the new Afrikaans tabloid published on a Friday.

Newspaper launches/closures

ThisDay, the South African edition of a Nigerian publication, was launched on 7 October 2003. It reached an averaged and audited circulation of 32,401 copies per day during its first three months. The success of this newspaper will depend appealing to readers in a market that is already segmented and over-populated.

Die Son, launched on 28 March 2003, initially focused its distribution within the Cape Province, but has extended its circulation to the Gauteng Province with the launch of its North edition in November 2003.

A number of newspapers have introduced separate weekend editions of their daily newspapers e.g. *Saturday Dispatch* and *Weekend Witness*.

The *Post Weekend* and the Saturday edition of *The Herald* have ceased trading.

Advertising

Retail advertising has grown particularly strongly.

Circulation

In general circulation has remained static for the traditional titles, but the one-year old *Daily Sun*, has been a remarkable success story for the daily tabloid sector. The latest audited circulation figures reveal that it is now the biggest South African daily newspaper with a circulation of 235,386 followed by *The Star*, which has a circulation of 165,948. *Daily Sun*'s success can be attributed to its strategy of focusing directly on the new mass reader and appealing specifically to their areas of interest i.e. lifestyle aspirations, sports, entertainment etc. The *Daily Sun* has shifted readers away from the traditional

titles such as *The Sowetan*, which has seen a decline in circulation from 154,747 in 2002 to 123,590 in 2003.

Weekly newspapers have remained static with the *Sunday Times* still the dominant Sunday read in South Africa. *Rapport* and *City Press* have shown a slight decrease while *Soccer Laduma* and *Sunday Sun* (the weekend edition of the *Daily Sun*) have shown an increase.

Readership

Daily newspaper readership has grown, particularly among 35-49 year-olds in Gauteng. The *Daily Sun* is the only title in this group that has shown a significant growth in readership. With a penetration of 5.5% (1.755 million readers), it is now close to *The Sowetan*, which is the daily with the largest readership at 1.853 million readers (6.2%). *Daily Sun* is however the largest daily in Gauteng.

Weekly newspaper readership remained stable overall, but readership of weeklies increased significantly in the Western Cape and particularly in Cape Town. The Western Cape is by far the leader with 62.3% of the adults in this province reading at least one or more newspapers a day, as opposed to Gauteng (which includes Johannesburg), which has 58.2% of the population reading one or more newspapers per day.

Basic literacy (can read and understand at least one language) remains static at 92.6%, but functional literacy (primary school completed) has increased from 79.5% a year ago to 81.0%.

Online/digital publishing

Most of the publishing houses have their own websites and there are more than 600 'netzines' listed as online publications, at least 16 of which specialise in daily news.

Ownership

A new owner entered the market in October 2003 with the launch of *ThisDay*, a South African edition of a Nigerian newspaper, owed by Nduka Obaigbena.

Johnnic Communications (Johncom) has concluded a deal with New Africa Investments Limited (NAIL) in which Johncom will acquire NAIL's shares in New Africa Publications, the owners of *The Sowetan* and *Sowetan Sunday World*.

Existing media legislation & authorities

(1) Advertising Standards Authority Code of Advertising Practice – the ASA regulates the credibility, veracity, task and propriety of advertising. The industry, in support of the principle of self-regulation, is working closely with the ASA to address concerns about certain categories of advertising, in particular classified advertising.

(2) Press Ombudsman Code of Conduct – the Code protects the freedom of the press and individual's rights in terms of editorial content.

(3) Media Development and Diversity Agency – was established in 2003 and is funded by a public/ private partnership to promote media development and diversity in South Africa. The big five publishing houses have committed their financial support to this agency to the tune of R30 million over a five-year period.

(4) Competition Commission – this body has extensive powers to intervene in areas where there is a potential for the concentration of power in the hands of one competitor.

(5) Independent Communications Authority of South



Africa (Act 13 of 2000) – this body was established to regulate broadcasting in the public interest and to ensure fairness and diversity of views broadly representative of South African society. It also regulated the telecommunications industry and awards licenses.

(6) The Department of Trade and Industry - through the Harmful Business Practices Act 71 of 1988, it is able to criminally prosecute offenders alleged to be engaged in practices that are unlawful or unethical. Through this same body the industry is subjected to the Lotteries Amendment Act which regulates the nature and form of competitions allowed in the pages of newspapers. All promotional competitions are regulated by this Act.

(7) The Department of Labour – through the Employment Equity Act and the Skills Development Act, the State is able to exercise significant influence in terms of employment and training practices of media enterprises. The industry has established a Sectoral Education and Training Authority (MAPPP SETA) for the media industry, to which the industry currently contributes 1% of its payroll per month as a skills levy.

(8) Promotion of Access to Information Act – this Act regulates access to information held by state and private bodies.

(9) Other Bodies and Acts

The Chapter 9 Bodies, established by the Constitution, have potential influence in the conduct of the South African media, in particular, content. These included the Human Rights Commission, the Gender Commission, the Pan South African Language Commission and the Youth Commission. Beyond these statutory created or recognised bodies lies the weight of common, criminal and civil law to which the media, as any corporate citizen, is subject.

New legislation

(1) Foodstuffs, Cosmetics and Disinfectants Act – December 2003

New regulations have been proposed regarding the marketing, promotion and sale of items relating to infant feeding – such as bottles, teats, dummies, formula and baby foods. Government is attempting to encourage breastfeeding by limiting access to information about bottle-feeding, and clamping down on promotion of related products. In the past, formula companies have been self-regulated, as signatories to a voluntary code.

The proposed regulations are far-reaching, and cover labelling, packaging, in-store promotions, advertising, sponsorship and other promotional activities. These regulations also curtail what the media can write about infant

feeding. The implications are extensive and it is argued that it violates the right to freedom of expression protected by the Constitution of the Republic of South Africa Act 108 of 1996 (“the Constitution”) and it infringes the public’s right to information. The industry has forwarded a submission to the Department of Health in response to these regulations and is currently awaiting a response from government.

(2) Convergence Bill - December 2003

These proposed regulations aim to regulate publishers of online content or information services and requires them to be licensed to provide such services, which is in violation of the right to freedom of expression contained in section 16 of the Constitution of the Republic of South Africa. Submissions from the respective stakeholders have been submitted and a response is being awaited.

Pending legislation

The government is discussion a potential anti-liquor campaign. It may try to regulate liquor advertising, which would seriously affect the newspaper industry.

Copyright

There is no planned legislation concerning copyright.

In general newspaper proprietors own copyright in the articles and photographs of all personnel in their full time employment. This has been established by precedent over time but has not been tested in court. Most proprietors enter into employment contracts with their full-time and freelance staff to protect the proprietors’ rights. There is no copyright on news of the day or on political speeches. Permission will only be required and royalty fees payable if a newspaper holds a copyright on the material. Trademarks, patents, designs and other material must be registered with the Companies and Intellectual Properties Offices (a division of the Department of Trade and Industry) to protect the publishers rights should any disputes arise.

Distribution

In cities newspapers rely heavily on street sales and door-to-door delivery. Supermarkets, café and news agencies offer additional selling points. In rural areas newspapers are mainly distributed in bulk or through central points.

State support

The Media Development and Diversity Agency (MDDA) offers financial support to small entrepreneurial media to promote media development and diversity in South Africa. Applicants have to conform to strict criteria before funding is granted.

POPULATION

Adult population by age

	All adults	
	000	%
16-24	8,903	29
25-34	7,369	24
35-49	7,840	26
50+	6,470	21
Total	30,582	100

Source: AMPS 2003

Adult population by income

Income per month (Rand):	All adults	
	000	%
1-499	2,502	8
500-899	6,414	22
900-1,399	4,431	15
1,400-2,499	4,536	15
2,500-3,999	3,569	12
4,000-6,999	3,754	13
7,000-11,999	2,649	9
12,000+	1,919	6
Total	29,774	100

Source: AMPS 2003

Newspaper reach (%)

	Daily
All adults	18.6

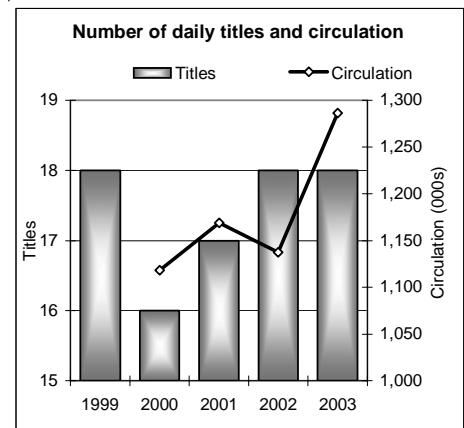
Source: AMPS 2003



NUMBER OF TITLES AND CIRCULATION

	1999	2000	2001	2002	2003	Change (%)	
						99/2003	2002/03
Number of titles							
Regional dailies	18	16	17	18	18	0.00	0.00
Non-dailies	259	261	276	285	286	10.42	0.35
<i>National non-dailies</i>	1	2	2	2	-	-	-
<i>Regional & local non-dailies</i>	103	99	104	108	108	4.85	0.00
<i>Free non-dailies</i>	155	160	170	175	178	14.84	1.71
Sundays	6	6	7	7	8	33.33	14.29
<i>National Sundays</i>	-	-	-	-	6	-	-
<i>Regional & local Sundays</i>	-	-	-	-	2	-	-
Circulation (000)							
Regional dailies	-	1,118	1,169	1,137	1,286	-	13.09
Non-dailies	-	4,230	4,553	4,832	5,695	-	17.85
<i>National non-dailies</i>	-	235	251	238	-	-	-
<i>Regional & local non-dailies</i>	-	795	902	1,095	1,265	-	15.57
<i>Free non-dailies</i>	-	3,200	3,400	3,500	4,430	-	26.57
Sundays	1,310	1,274	1,281	1,449	1,465	11.85	1.08
Total annual sales (millions of copies)							
Regional dailies	-	280	292	284	322	-	13.38
Non-dailies	-	217	233	230	285	-	23.91
Sundays	67	65	65	74	75	11.94	1.35

Source: Audit Bureau of Circulation (data refers to registered titles only)

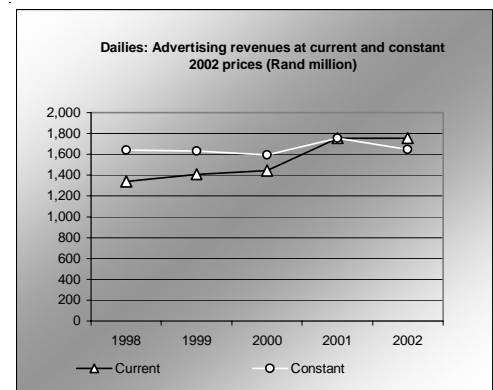


MORE FACTS

	1999	2000	2001	2002	2003	Change (%)	
						99/2003	2002/03
Advertising revenues (Rand million)							
Dailies	1,343	1,407	1,445	1,758	1,756	30.73	-0.15
Dailies \$	1,639	1,631	1,598	1,758	1,647	0.50	-6.33
Weekends	570	657	652	814	886	55.44	8.85
Community papers	393	412	423	534	768	95.42	43.77

§ at constant 2002 prices

Before discounts - medium to large advertisers can expect discounts of 20% or more, rising with volume. Excludes classified and inserts, which are important for many titles. After agency commission of 16.5%



Top ten dailies (2003)

Title	Publisher	Circulation (000)	Readership (000)	Cover Price		Format	Full page rate (Rand)	
				Rand	US\$		Mono	Colour
Daily Sun	Media24	235	874	1.20	0.11	Tabloid	25,913	35,509
Star	Independent Newspapers	166	649	3.00	0.28	Broadsheet	68,278	85,347
Sowetan	Johnnic	124	1,983	2.50	0.24	Tabloid	33,033	54,054
Burger	Media24	103	549	2.30	0.22	Broadsheet	48,235	67,980
Beeld	Media24	101	339	3.00	0.28	Broadsheet	54,664	76,626
Citizen	Caxton	98	534	2.50	0.24	Tabloid	22,386	33,579
Cape Argus	Independent Newspapers	73	405	3.00	0.28	Broadsheet	39,015	62,424
Issolezwe	Independent Newspapers	55	268	1.50	0.14	Tabloid	-	12,215
Daily News	Independent Newspapers	51	294	2.80	0.27	Broadsheet	33,394	53,428
Cape Times	Independent Newspapers	49	295	3.50	0.33	Broadsheet	33,345	53,352

Source: Media Manager, ABC

Top advertising categories in dailies (2003)

Advertising sector	% of total ad revenue
Retail	25.5
Travel, transport & leisure	14.8
Business to business	13.0
Banking/insurance	9.9
Health & beauty	9.7
Education & government	7.2
Beverages	5.9
Household	5.3
Food	4.4
Media promotion	2.2

Source: Nielsen's AdEx Jan-Dec 2003

Top ten advertisers (2003)

Advertiser	Print media expenditure Rand (millions)
Pick 'n Pay	172.5
National government	130.1
Shoprite Checkers	125.4
Spar SA	77.4
Standard Bank SA	68.5
Mobile Telephone Network	67.2
Relyant Retail Ltd	65.2
Cell C	55.0
Vodacom Communications	53.0
Edcon	52.2

Source: Nielsen's AdEx Jan-Dec 2003



Top publishing companies (2003)

Monthly circulation (000)	
Media24	20,101
Independent News	13,628
Caxton	8,551
Johnnic	7,123
BDFM	840
Mandla Matla	788
M&G	151
Others (102)	34,389

Source: Media Manager, ABC, publishers

Newspaper colour capability & formats

Number of:	1999	2000	2001	2002
4-colour newspapers	17	27	17	18
Broadsheets	13	22	13	13
Tabloids	4	5	4	5

Cover prices

	Rand
Single copy	1.20-4.20

ADVERTISING EXPENDITURE & ECONOMIC DATA

Advertising expenditure

(Rand millions, in current prices)

	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
Newspapers	1,520	1,794	2,055	2,221	2,473	2,520	3,111	3,577	3,810	4,114	4,443
Magazines	818	966	1,107	1,196	1,220	1,279	1,441	1,541	1,648	1,764	1,904
Television	1,938	2,398	2,936	3,311	3,567	4,146	4,976				
Radio	658	726	794	926	1,223	1,206	1,440				
Cinema	47	70	77	66	69	62	77				
Outdoor	149	195	211	251	326	382	428				
Internet	0	0	0	0	0	53	46				
Total	5,130	6,149	7,180	7,971	8,878	9,648	11,519	12,838	13,957	15,156	16,548

Source: 1996-2002 Adindex/Nielsen, 2003-2006 ZenithOptimedia

Notes: Includes agency commission (16.5%), excludes classifieds and production costs, after discounts (major advertisers only; others before discounts).

Main economic indicators 1996-2002

	1996	1997	1998	1999	2000	2001	2002
1 US\$= 10.54 Rand at 2002 rate							
Gross Domestic Product (Rand billion)							
at current prices	618	686	739	801	888	983	1,099
% change	12.7	11.0	7.8	8.4	10.9	10.7	11.8
at 2002 prices	921	938	950	977	1,030	1,087	1,099
% change	5.0	1.9	1.2	2.9	5.4	5.6	1.1
Gross Domestic Product per capita (Rand 000)							
at current prices	15.3	16.6	17.5	18.6	20.3	22.2	24.8
at 2002 prices	22.8	22.8	22.5	22.7	23.6	24.5	24.8
Population							
Millions	40.3	41.2	42.1	43.1	43.7	44.3	44.3
Consumer Price Index							
2002=100	67.1	73.1	77.8	81.9	86.3	90.4	100.0
% change	7.4	8.9	6.5	5.3	5.3	4.9	10.6
Ad.spend as a % of GDP							
	0.83	0.90	0.97	1.00	1.00	0.98	1.05
Advertising Expenditure Growth (%)							
at current prices	12.5	19.9	16.8	11.0	11.4	8.7	19.4
at 2002 prices	4.8	10.0	9.7	5.4	5.8	3.6	8.0

Source: IFS, ZenithOptimedia

Research

Circulation is audited by: Audit Bureau of Circulations of Southern Africa (ABC)

Readership is measured by: South African Advertising Research Foundation (SAARF), an independent body set up by marketing and media organisations. Newspaper bodies are represented on all appropriate committees.

Methodology: Twice-yearly survey of a sample of approximately 20,000 individuals.

Taxes

VAT on: sales 14% advertising 14%
newsprint 14% plant 14%
composition 14% (standard VAT rate 14%)

There is no special tax on advertising or bill posting.

The tax rate on corporate profits is 30% for all companies including newspaper publishers.

Ownership

Does any law exist governing publishing-house ownership, or the registration of shares in newspaper-publishing companies? No

Is there any law prohibiting or restricting foreign companies or individuals from owning shares, and in particular, the majority of shares, of daily newspapers? The only restrictions are financial. For instance, foreign-owned publications are restricted in what they can borrow. The Independent Broadcasting Act limits foreign ownership of broadcasting services to 20% of capital and votes.

Is there any law prohibiting daily newspaper or periodical publishers from operating radio or television stations in the same locality? Yes. Independent Broadcast Act states that no person who controls

a newspaper may own a radio or television licence in an area where the newspaper accounts for more than 20% of circulation in that area.

So as to guarantee disclosure and transparency in the capital structure and to avert silent partnerships, is there a law or rule making it possible to determine who actually owns a publishing company? Yes. The courts can order disclosure, although generally there is no guarantee of transparency.

Is there an antitrust law limiting concentration in the daily press? No. The Independent Broadcasting Act limits ownership of broadcasting services to no more than one television licence and two radio licences.

Is further regulation of media concentration expected? The Independent Broadcasting Act is expected to be amended at some point to be more like laws in the UK and the US.

Commentary - Asociación de Editores de Diarios Españoles (AEDE)

The Spanish economy grew by only 2.4% in 2003; however, this growth rate was above the average growth of the EU (0.7%). The main sectors pushing the Spanish economy upwards during the past year were construction and consumer spending.

GNP = 2.4 %

Inflation rate = 2.6 %

In 2003 total advertising revenue increased by around 2.6% to Euro 12,015 million. Furthermore, conventional media increased its market share to 46.4%, up from 46.2% in 2002; total investment in conventional media was up 3% year-on-year to Euro 5,571 million.

Within this sector, only daily newspapers and Sunday supplements lost market share. Daily newspaper investment decreased by around 2.3% to Euro 1,496 million (equivalent to around 26.9% of total advertising revenue in conventional media). Sunday supplements investment declined by 0.8% to

Euro 105.9 million (around 1.9% of total advertising revenue in conventional media). The average impact on advertising revenues was considerable (down 2.2% overall), but the decrease was not as high as that experienced in 2002. National newspapers felt the biggest impact because they attract the type of advertising which is more directly affected by an economic downturn than the regional and local dailies.

Another point of concern is that advertising expenditure as a percentage of GNP has been steadily decreasing over the past few years: 2000 - 1.93%, 2001 - 1.79%, 2002 - 1.68% and 2003 - 1.64%.

Ownership (mergers, alliances)

The two digital TV operators successfully merged, and the media companies owned by Telefónica (Antena 3, a private national TV station, and Onda Cero, a national radio station) have been sold to a group in which the owners of the daily *La Razon* have a big stake.

POPULATION

Adult population by age and sex

	All individuals		Male		Female		Households 000
	000	%	000	%	000	%	
Children	6,347	16	3,259	16	3,088	15	13,462 *
16-24	5,182	13	2,654	13	2,528	12	
25-34	6,852	17	3,492	18	3,360	16	
35-44	6,298	15	3,156	16	3,142	15	
45-54	5,028	12	2,495	13	2,533	12	
55-64	4,052	10	1,965	10	2,087	10	
65+	6,950	17	2,931	15	4,019	19	
Total	40,709	100	19,952	100	20,757	100	

Source: EGM 2003

* 2002 figure

Population by social class and sex

	All adults		Males		Females		Households *	
	000	%	000	%	000	%	000	%
A+B	2,450	7	1,299	8	1,151	6	777	6
C1	5,138	15	2,610	15	2,528	14	1,861	14
C2	14,469	41	7,278	42	7,191	40	5,613	42
D	10,347	29	4,749	28	5,598	31	3,660	27
E	2,838	8	1,212	7	1,626	9	1,553	12
Total	35,242	100	17,148	100	18,094	100	13,464	100

Source: EGM Acumulado 2003 * 2002 data

A+B = upper class

C1 = upper middle class

C2 = middle class

D = lower middle class

E = lower class

Age structure of daily readership

Age	% of readership	% reach within age group
0-15	8.2	30.4
16-24	9.0	41.7
25-34	19.4	45.1
35-44	17.9	46.9
45-54	14.3	46.8
55-64	11.5	38.3
65+	19.7	26.7

Source: EGM Acumulado 2003

Housewives (co-habiting persons)

	Housewives	
	000	%
under 25	429	3
25-34	2,233	16
35-44	2,995	21
45-54	2,545	18
55-64	2,155	15
65+	3,877	27
Total	14,234	100

Source: EGM Acumulado 2003

Households

Household size	Households	
	000	%
1 person	2,944	21
2 people	3,585	25
3 people	3,003	21
4 people	3,039	21
5 or more people	1,663	12
without children	10,754	76
with children	3,479	24
with children aged 0-3	525	4
with children aged 4-9	1,036	7
with children aged 10-13	2,664	19
Total	14,234	100

Source: EGM Acumulado 2003, EGM Universo 2003

Newspaper reach (%)

	Daily
All adults	39.7
Men	50.0
Women	30.0
MHS	30.8

Source: EGM Acumulado 2003

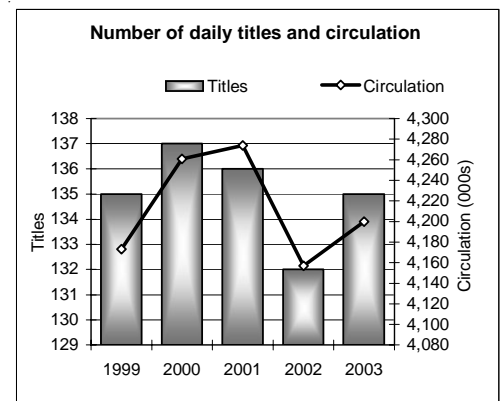
MHS: Main Household Shopper



NUMBER OF TITLES AND CIRCULATION

	1999	2000	2001	2002	2003	Change (%)	
						99/2003	2002/03
Number of titles							
Total dailies	135	137	136	132	135	0.00	2.27
Non-dailies	10	-	-	-	-	-	-
Free papers	180	-	-	-	-	-	-
Circulation (000)					*		
Total dailies	4,173	4,261	4,274	4,157	4,200	0.65	1.03
Non-dailies	5,827	-	-	-	-	-	-
Total annual sales (millions of copies)							
Dailies	1,511	1,543	1,547	1,505	1,520	0.64	1.04
Non-dailies	303	-	-	-	-	-	-
Free papers	150	-	-	-	-	-	-

Circulation figures, and all figures for non-dailies and free papers, are estimated



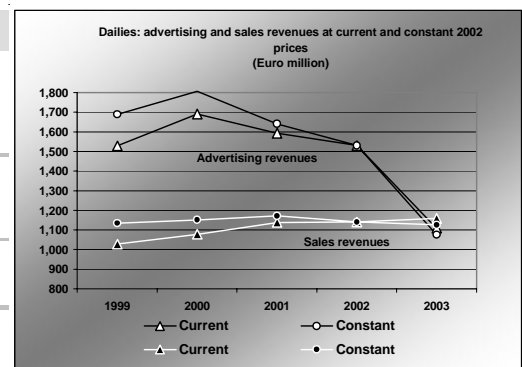
MORE FACTS

	1999	2000	2001	2002	2003	Change (%)	
						99/2003	2002/03
Advertising revenues (Euro million)							
Dailies[^]	1,530	1,692	1,594	1,531	1,110	-27.45	-27.51
Dailies §	1,690	1,807	1,642	1,531	1,077	-36.29	-29.69
Sundays	109	117	111	107	-	-	-
Newspapers online	-	-	111	-	-	-	-
Sales revenues (Euro million)							
Dailies	1,028	1,078	1,138	1,141	1,160	12.87	1.69
Dailies §	1,135	1,151	1,173	1,141	1,125	-0.88	-1.37
Non-dailies[^]	445	-	-	-	-	-	-
Volume of advertising sold (pages and page equivalents)							
Total	693,101	752,839	787,163	810,894	857,715	23.75	5.77
In colour	128,177	158,737	172,302	204,609	244,739	90.94	19.61

Source: Infoadex

§ at constant 2002 prices ^ 1999 figure is estimated

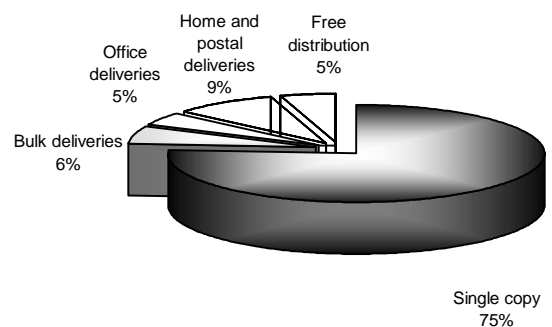
Advertising revenues include classifieds and production costs; they are at ratecard prices, so do not take discounts into account.



Type of newspaper sales (%)

	Single copy	Bulk deliveries	Office deliveries	Home and postal deliveries	Free distribution
1999	82.1	3.5	1.8	8.4	4.2
2000	79.8	4.4	2.7	8.7	4.4
2001	77.5	5.3	3.7	8.8	4.6
2002	76.0	5.9	4.5	9.0	4.6

Type of newspaper sales in 2002 (%)



Top ten dailies (2003)

Title	Publisher	Circulation (000)	Readership (000)	Cover Price		Format	Full page rate (Euro) **	
				Euro	US\$		Mono	Colour
El País	Diario El País	435	1,941	1.00	0.94	Broadsheet	15,780	22,090
Marca *	Recoletos Grupo de Comun.	382	2,475	0.90	0.85	Broadsheet	6,978	10,583
El Mundo del Siglo XXI	Unidad Editorial	300	1,169	1.00	0.94	Broadsheet	13,800	28,600
ABC	Diario ABC	263	802	1.00	0.94	Special	14,399	19,438
La Vanguardia	La Vanguardia	203	653	1.00	0.94	Broadsheet	8,950	11,000
AS *	Diario AS	177	845	0.85	0.80	Broadsheet	5,360	7,500
El Periodico de Catalunya	Ediciones Primera Plana	167	831	1.00	0.94	Broadsheet	10,938	14,640
La Razon	Audiovisual Española 2000	140	375	0.80-1.00	0.75-0.94	-	8,170	10,620
El Correo	Diario El Correo	128	549	1.00	0.94	Broadsheet	6,977	-
La Voz de Galicia	La Voz de Galicia	111	680	1.00	0.94	Broadsheet	6,243	7,537

Source: AEDE

* sport newspapers

** 2001 data



Contribution of classified and display advertising to total advertising income (%)

	1999	2000	2001	2002	2003
Display	73.9	74.3	70.4	71.6	70.7
Classified	26.1	25.7	29.6	28.4	29.3

Source: Infoadex

Top ten advertising categories (2003)

Sector	% of display ad revenue
Miscellaneous	44.9
Culture, education & media	18.5
Auto	13.9
Public & private services	12.4
Transport/travel/tourism	10.9
Distribution/retail	10.5
Construction	9.6
Telecommunications/internet	6.4
Finance	5.8
Sports/leisure	2.4

Source: Infoadex

Top ten publishing companies (2002)

(ranked by total circulation)

Diario El País
Recoletos Grupo de Comunicacion
Unidad Editorial
Diario ABC
La Vanguardia
Diario AS
Ediciones Primera Plana
Audiovisual Española 2000
Diario El Correo
La Voz de Galicia

Top ten advertisers (2003)

Advertiser	Newspaper expenditure Euro (000)
Telefónica Móviles	21,066
Viajes Marsans	17,135
Viajes Halcón	15,311
Renault España Comercial	14,251
El Corte Inglés	13,579
Volkswagen-Audi	12,454
Opel España de Automóviles	11,854
Advanced Telephone Services	11,346
Viajes El Corte Inglés	10,431
Nissan Motor España	9,975

Source: Infoadex

Media consumption (minutes per day)

	1999	2000	2001	2002	2003
Newspapers	16.2	17.5	15.0	15.4	15.9
Magazines	7.5	4.6	4.5	3.9	3.9
Radio	95.0	95.0	94.0	103.0	118.0
Television	224.0	222.0	226.0	235.0	246.0
Internet	-	5.5	8.9	12.0	16.6

Source: EGM Acumulado 2003

Employment & salary

	1998	1999	2000	2001	2002
Total no. of journalists	4,940	5,700	-	-	-
Total no. of employees	10,834	11,400	-	10,150	12,859
Total salary costs					
<i>Euro (mill)</i>	455	498	-	-	619

Internet publishing (No. of online editions)

	1999	2000	2001	2002*	2003
Dailies	29	85	100	100	100+
Non-dailies	6	-	-	-	-

*estimate

Cover prices

	Euro
Single copy	0.70-1.20

Online readership (page impressions per month)

Newspaper	Nov/Dec 2000	Dec 2001	Dec 2002	Dec 2003
El Mundo del Siglo XXI	1,218,052	3,286,204	3,948,547	168,718,185
El País	916,631	3,192,994	3,810,010 *	-
Marca	1,839,616	2,423,160	3,655,044	-
ABC	378,170	845,115	1,166,314	38,991,301
La Vanguardia	369,661	811,862	-	-
AS	-	-	784,991	34,497,176
Recoletos	-	-	-	131,449,965
Correo Digital	-	-	-	12,689,910

Source: OJD

* data for February 2002

ADVERTISING EXPENDITURE & ECONOMIC DATA

Advertising expenditure

(Euro million, in current prices)

	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
Newspapers	1,151	1,216	1,327	1,530	1,692	1,594	1,531	1,496	1,518	1,549	1,580
Magazines	569	596	630	675	735	731	697	705	715	729	744
Television	1,382	1,488	1,731	2,100	2,311	2,151	2,185				
Radio	360	377	411	466	502	490	485				
Cinema	30	32	38	42	55	45	45				
Outdoor	166	178	198	282	308	407	409				
Internet	0	0	5	15	53	52	52				
Total	3,658	3,887	4,340	5,110	5,656	5,468	5,404	5,562	5,724	5,930	6,166

Source: 1996-2002 Duplo/Nielsen/Infoadex, 2003-2006 ZenithOptimedia

Notes: After discounts, excludes agency commission, production costs and classified advertising; magazines exclude directories.

**Main economic indicators 1996-2002**

	1996	1997	1998	1999	2000	2001	2002
1 US\$= 1.06 Euro at 2002 rate							
Gross Domestic Product (Euro billion)							
at current prices	443	468	497	565	609	652	694
% change	5.7	5.6	6.1	13.7	7.8	7.1	6.4
at 2002 prices	504	523	545	606	631	672	694
% change	5.1	3.6	4.2	11.2	4.2	6.5	3.3
Gross Domestic Product per capita (Euro 000)							
at current prices	11.3	11.9	12.6	14.3	15.4	16.2	17.2
at 2002 prices	12.8	13.3	13.8	15.4	16.0	16.7	17.2
Population							
Millions	39.3	39.3	39.4	39.4	39.5	40.3	40.3
Consumer Price Index							
2002=100	87.9	89.6	91.2	93.3	96.5	97.0	100.0
% change	3.6	1.9	1.8	2.3	3.4	3.6	3.1
Ad.spend as a % of GDP							
	0.83	0.83	0.87	0.90	0.93	0.84	0.78
Advertising Expenditure Growth (%)							
at current prices	3.3	6.3	11.7	17.7	10.7	-3.3	-1.2
at 2002 prices	-0.3	4.3	9.6	15.1	7.0	-6.7	-4.1

Source: IFS, ZenithOptimedia

Research

Circulation is audited by: Oficina para la Justificación de la Difusión (OJD)

Readership is measured by: The Audience Media Research Association – Spain (AIMC), which conducts the General Media Study (EGM).

Methodology: Each year 44,000 individuals aged over 14, selected from 7,288 sampling points, are interviewed at home, face-to-face.

Taxes

VAT on: sales 4% advertising 16%
 newsprint 16% plant 16%
 composition 16% (standard VAT rate 16%)

All private companies pay 35% tax on profits.

Subsidies

Are there subsidies for the purchase of newsprint? No

Are loans granted at low interest rates for re-equipping or improving existing equipment? No

Discounts

on: post 25%-50% rail 0 telephone 0 telegraph 0 telex 0

Ownership

Does any law exist governing publishing-house ownership, or the

registration of shares in newspaper-publishing companies? No

Is there any law prohibiting or restricting foreign companies or individuals from owning shares, and in particular, the majority of shares, of domestic daily newspapers? The press is subject to no specific regulation, but follows the general legislation for foreign capital investment. If foreign investment does not exceed 50% of total capital investment then such investment is not subject to administrative scrutiny. Participation over 50% is allowed but subject to investigation.

Is there any law prohibiting daily newspaper or periodical publishers from operating radio or television stations in the same locality? No, but no person, private or governmental, Spanish or foreign, may own more than 49% of a television company.

So as to guarantee disclosure and transparency in the capital structure and to avert silent partnerships, is there a law or rule making it possible to determine who actually owns a publishing company? No

Is there an antitrust law limiting concentration in the daily press? No

Is further regulation of media concentration expected? No

Due to a lack of available data, the majority of charts in this entry have not been updated since the 2002 edition of World Press Trends. Those that have not been updated clearly state the year to which the data relates.

POPULATION & MORE FACTS

Population by age and sex (2002)

	All individuals		Male		Female		Households 000
	000	%	000	%	000	%	
Children	4,693	25	2,386	25	2,307	24	3,336
15-24	3,516	19	1,780	19	1,736	18	
25-34	3,033	16	1,551	16	1,482	16	
35-44	2,822	15	1,415	15	1,407	15	
45-54	2,240	12	1,113	12	1,127	12	
55-64	1,377	7	677	7	700	7	
65+	1,238	7	577	6	661	7	
Total	18,919	100	9,499	100	9,420	100	

Age structure of readership (2000)

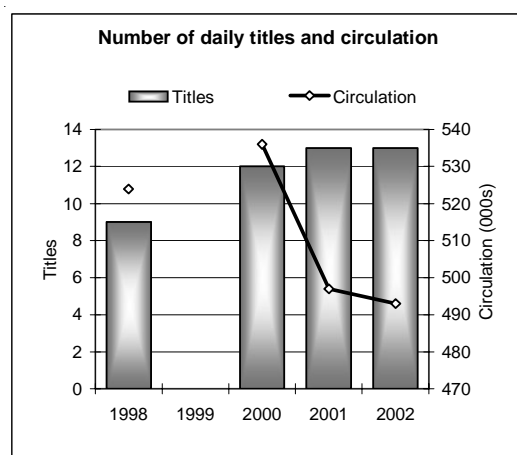
Age	% of readership
Under 20	16
21-40	45
41-60	27
61+	12

Newspaper reach (%) (2002)

	Daily	Weekly	Monthly
All adults	90	95	95

NUMBER OF TITLES AND CIRCULATION

	1998	1999	2000	2001	2002	Change (%)	
						98/2002	2001/02
Number of titles							
Total dailies	9	-	12	13	13	44.44	0.00
National	-	-	-	-	11	-	-
Regional	-	-	-	-	2	-	-
Non-dailies	31	-	36	38	37	19.35	-2.63
National	-	-	-	-	37	-	-
Sundays	12	-	15	14	15	25.00	7.14
Circulation (000)							
Total dailies	524	-	536	497	493	-5.92	-0.80
Non-dailies	1,318	-	1,322	1,317	1,302	-1.21	-1.14
Sundays	1,280	-	1,317	723	720	-43.75	-0.41
Total annual sales (millions of copies)							
Dailies	161.4	-	176.9	164.4	162.7	0.81	-1.03
Non-dailies	68.0	-	68.7	68.5	67.7	-0.44	-1.21
Sundays	66.5	-	68.5	37.6	37.4	-43.76	-0.51



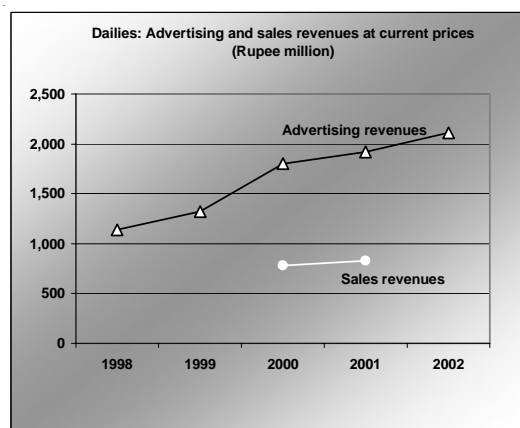
MORE FACTS

	1998	1999	2000	2001	2002	Change (%)	
						98/2002	2001/02
Advertising revenues (Rupees million)*							
All newspapers	1,139	1,321	1,800	1,920	2,110	85.25	9.90
Dailies	-	-	-	-	1,406	-	-
Sundays	-	-	-	-	704	-	-
Sales revenues (Rupees million)**							
Dailies & non-dailies	-	-	780	830	-	-	6.41
Sundays	-	-	420	450	-	-	7.14

*After discounts. Typical discounts range from 5-15%

**Excludes VAT

*** Change (%) for 2000/01

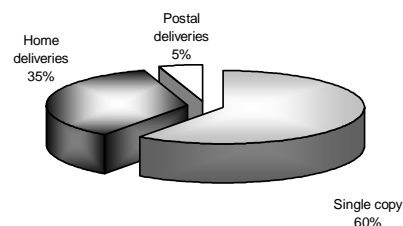


Type of newspaper sales (%)

	Single copy	Home deliveries	Postal deliveries
1998	68	26	6
1999	-	-	-
2000	58	36	6
2001	-	-	-
2002 *	60	35	5

* Approximate figures

Type of newspaper sales in 2002 (%)



**Distribution and newsprint costs**

	2000	2001	2002
Distribution as % of average cover price	5	12	-
Newsprint costs (average per ton)			
Rupees	-	46,466	34,000

Top dailies (2002)

Title	Publisher	Circulation (000)	Readership* (000)	Cover Price		Format	Full page rate (Rupees)	
				Rs	US\$		Mono	Colour
Lankadeepa	Wijeya Publications	131	726	15.00	0.16	Broadsheet	108,000	155,000
Divaina	Upali Group	125	698	15.00	0.16	Broadsheet	80,000	128,000
Daily News	Associated Newspapers	68	374	15.00	0.16	Broadsheet	93,500	150,200
Dinamina	Associated Newspapers	50	275	15.00	0.16	Broadsheet	60,500	103,700
Island	Upali Group	41	225	15.00	0.16	Broadsheet	65,000	104,000
Lakbima	Sumathi Newspapers	22	132	15.00	0.16	Broadsheet	55,000	82,500
Virakesari	Associated Newspapers	20	110	10.00	0.10	Broadsheet	40,000	66,500
Daily Mirror	Wijeya Publications	15	82	15.00	0.16	Broadsheet	72,000	125,000
Thinakaran	Associated Newspapers	12	66	8.00	0.08	Broadsheet	38,500	62,800
Dinakural	-	8	50	8.00	0.08	Broadsheet	-	-

*readership figures are estimates

Top advertising categories (2002)**Advertising sector**

Banking & finance
Consumer goods
Employment
IT
Auto
Education
Entertainment
Travel & leisure
Alcohol

Top publishing companies (2002)**Company**

Associated Newspapers
Wijeya Publications
Upali Newspapers
Leader Publications
Sumathi Newspapers
Express Newspapers
Ravaya Publications

Employment

	2000	2001	2002
Total no. of journalists	910	1,020	1,100
Total no. of employees	3,630	3,940	3,900

Newspaper colour capability & formats

Number of:	2000	2001	2002
4-colour newspapers	18	22	22
Broadsheets	23	27	27
Tabloids	4	3	3

Cover prices (2002)

	Rs
Single copy	6-25

Internet publishing (No. of online editions)

	1997	1998	1999	2000
Dailies	4	6	-	7
Non-dailies	5	5	-	8

ADVERTISING EXPENDITURE & ECONOMIC DATA**Main economic indicators 1996-2002**

	1996	1997	1998	1999	2000	2001	2002
1 US\$= 95.66 Rupees at 2002 rate							
Gross Domestic Product (Rupees billion)							
at current prices	768	890	1,018	1,106	1,258	1,400	1,565
% change	15.0	15.9	14.3	8.6	13.7	11.3	11.8
at 2002 prices	1,282	1,355	1,417	1,471	1,575	1,535	1,565
% change	-0.8	5.7	4.6	3.8	7.1	-2.6	2.0
Gross Domestic Product per capita (Rupees 000)							
at current prices	41.9	48.0	54.2	58.1	65.0	73.3	81.9
at 2002 prices	70.0	73.1	75.5	77.3	81.4	80.4	81.9
Population							
Millions	18.3	18.6	18.8	19.0	19.4	19.1	19.1
Consumer Price Index							
2002=100	59.9	65.7	71.8	75.2	79.8	91.2	100.0
% change	15.9	9.6	9.3	4.7	6.2	14.2	9.6

Source: IFS, ZenithOptimedia

**Share of adspend (%)**

	2000	2001	2002 *
Newspapers & magazines	27.4	27.0	25
Television	38.2	38.6	40
Radio	22.3	22.0	25
Others **	12.1	12.4	10

* Approximations only

** includes posters, billboards, transport, blimps, etc.

Research

Circulation is measured by: The Lanka Market Research Bureau (LMRB)

Methodology: Sampling

Taxes

VAT on: sales 20% advertising 20%
newsprint 0* plant 10%

*All newsprint duties and tariffs have been removed, to great relief of the industry.

There is no special rate of tax on profits for newspapers.

Subsidies

Are there subsidies for purchasing newsprint? No

Are loans granted at low interest rates for re-equipping or improving existing equipment? Normal bank loans can be made for equipment at rates between 14% and 22%.

Discounts

on: post 0 rail 0 telephone 0 telegraph 0 telex 0

Ownership

Does any law exist governing publishing-house ownership, or the registration of shares in newspaper-publishing companies? Yes, the Registration Law.

Is there any law prohibiting or restricting foreign companies or individuals from owning shares, and in particular, the majority of shares, of domestic daily newspapers? No

Is there any law prohibiting daily newspaper or periodical publishers from operating radio or television stations in the same locality? No

So as to guarantee disclosure and transparency in the capital structure and to avert silent partnerships, is there a law or rule making it possible to determine who actually owns a publishing company? All public companies are required to disclose their ownership; private companies are not. Publishing companies are subject to no special regulation.

Is there an antitrust law limiting concentration in the daily press? No

Is further regulation of media concentration expected? No. The government is actually looking at media deregulation.

General economic situation

GDP total US\$52.9 billion; GDP per capita US\$1,388 (purchasing power parity; 2002). Consumer price index 109.2 (2002).

Performance of newspapers vs. other media

Radio and television were controlled directly by the government and were required to reflect government policies. During 2002 there was a marked expansion of government-controlled regional radio and television. Television had a permanent military censor to ensure that the news reflected official views. There were no privately owned television or radio stations, although the government and private investors jointly owned one television cable company. The government often charged that the international, and particularly the Western, media had an anti-Sudan and anti-Islam bias.

In spite of the restrictions on ownership of satellite dishes, citizens had access to foreign electronic media; the government did not jam foreign radio signals. In addition to domestic and satellite television services, there was a pay cable network, which directly rebroadcast uncensored Cable News Network, the British Broadcasting Company, the London-based, Saudi-owned Middle East Broadcasting Corporation, Al-Jazeera, Dubai-TV, Kuwait-TV, and a variety of other foreign programmes.

Performance of different types of newspapers

There were a large number of independent daily newspapers in Arabic and English, mainly in urban areas, including 16 'political', six sports and four social titles. There was one government-controlled newspaper. In 2003, three newspapers – *Al-Sahafa* (centre), *Al-Horriyya* (left), and *Al-Sahafi Al-Dowali* (Islamic) – merged to create a new company called Al-Wassaet Al-Mutaadida (Multimedia Group). It publishes an Arabic daily, an English daily and a weekly. All newspapers in Sudan are published in Khartoum, even the one paper that is southern-oriented: the *Khartoum Monitor*, the English language daily.

Newspaper launches/closures

Two daily newspapers were seized for failing to obey government instructions on how to report the student protests at Khartoum University. The PNC newspaper *Rai-al-Sh'ab* ('People's View') remained banned at the year's end.

Circulation

The National Press Council estimates that total circulation of

all newspapers is less than 80,000. Even the more optimistic estimates of the publishers only place the circulation between 100,000 and 130,000.

Media/press laws

Under the penal code, propagating false news is punishable by either a prison term or a fine.

The government exercised control of news reporting, particularly of political topics, the war, and criticism of the government, through the National Press Council and security forces. Newspapers were prohibited from publishing articles about the war with the exception of information provided by the Ministry of Defence or official government statements. Nevertheless, the local press did report the findings of the CPMT investigations. The National Press Council applied the Press law and was directly responsible to the President. It was charged with licensing newspapers, setting press policy, and responding to complaints. In the event of a complaint, it can give a newspaper a warning or suspend it for up to 15 days. It also can suspend a newspaper indefinitely and suspend journalists for up to two weeks. The National Press Council consisted of 21 members: seven selected by the President; five from the National Assembly; seven directly elected by journalists from the Journalists' Union; and two selected by the Journalists' Union leadership. Observers believed the Journalist's Union was government-controlled. The National Press Council was active in suspending journalists and newspapers in 2001.

During the year the National Security Offices imposed restrictions on press freedom by suspending publications, detaining journalists and editors, confiscating already printed editions, conducting prepublication censorship, and restricting government advertising to pro-government media only.

Distribution

In the south distribution not only of newspapers but also of publications of all types relies largely on military and humanitarian aid transport networks. Even the churches, which are said to have a presence in most villages in south Sudan, struggle to distribute their publications.

Sources: CIA – *The World Factbook 2003*; *Freedom House*; *US State Department*; *International Media Support, Denmark*

POPULATION & MORE FACTS

Population by age and sex

	All individuals		Male		Female	
	000	%	000	%	000	%
0-14	16,757	44	8,562	44	8,195	44
15-64	20,507	54	10,261	53	10,246	54
65+	850	2	469	2	381	2
Total	38,114	100	19,292	100	18,822	100

Source: CIA - *The World Factbook 2003*

Top ten dailies (2002)

Title
Al-Ray Alam
Al-Ayam
Al-Khartoum
Al Waan
Al-Usbua
Shar' Al-Siasi
Addaraweesh
Al-Sahafa
Al-Anba
New Horizon

Source: WAN from public sources

SURINAME

General economic situation

GDP total US\$1.469 billion; GDP per capita US\$3,369 (purchasing power parity; 2002). Consumer price index 117 (2002).

Performance of newspapers vs. other media

Media generally operate in several languages, reflecting the diversity of the population. State-owned broadcasters are on the air alongside commercial radio and TV stations. There are 11 television stations, and about 25 radio stations. Three television stations and two radio stations were owned publicly. Three companies, one owned publicly, provided cable television, which included foreign channels. Many

television and radio stations broadcast only in a limited area.

Performance of different types of newspapers

The country's two daily newspapers – De Ware Tijd and De West – are privately owned.

State support

The state places relatively high costs on establishing media outlets and the media are somewhat reliant on the state for funding.

Sources: CIA – The World Factbook 2003; International Press Institute; BBC News; US State Department; Freedom House

POPULATION & MORE FACTS

Population by age and sex

	All individuals		Male		Female	
	000	%	000	%	000	%
0-14	134	31	69	31	65	30
15-64	276	63	141	64	135	63
65+	26	6	12	5	14	7
Total	436	100	222	100	214	100

Source: CIA - The World Factbook 2003

	2002
Number of titles	
Total dailies	2
<i>National dailies</i>	2

Source: WAN from public sources

Top dailies (2002)

Title
De Ware Tijd
De West

Source: WAN from public sources

SWAZILAND

General economic situation

GDP total US\$5.542 billion; GDP per capita US\$4,769 (purchasing power parity; 2002). Consumer price index 111.8 (2002).

Performance of newspapers vs. other media

The government has a monopoly over television and radio programming, with the exception of a Christian radio station. There are two government-owned radio stations. There is one independent radio station, which only broadcast religious programmes. Broadcast and print media from South Africa are available.

Performance of different types of newspapers

There is one daily independent newspaper and a daily government-financed newspaper.

The independent newspaper – *The Times of Swaziland* – was bought in 1975 by a British expatriate Douglas Loffler, who acquired it from The Argus Group of South Africa. Under Loffler, the *Times* became a daily.

The state-owned Swazi Observer group reappeared in 2001, a year after its closure by its own management committee. The Swazi Observer group of papers is made up of the *Daily Observer*, the *Weekend Observer*, and *Instantsemi*. It was established in 1982, when it was given as a gift to King Sobhuza from the late millionaire who headed the multinational company Lonrho. Sobhuza then entrusted the newspaper to the Tibiyo Takangwane corporation, which is a company owned by the King on behalf of the Swazi nation. After Sobhuza's death the newspaper was left to King Mswati III.

The prime minister's office distributed a free weekly circular reporting on government policy and activities.

Newspaper launches/closures

In 2001 the information minister ordered the suspension of the weekly *The Guardian* and the monthly *The Nation*. The authorities accused the two publications of not paying their registration tax of 1,000 emalangen (about €130). This decision was taken by virtue of a publishing law passed in 1963.

Advertising

With some exceptions, the government continued to withhold its advertising from the independently owned daily newspaper.

Media/press laws

Legislation bans the publication of any criticism of the monarchy, and journalists are occasionally prosecuted on criminal defamation charges.

The decree No. 2/2001 signed in June 2001 gave the 'minister concerned' the authority to ban a publication without stating the reason and without any court proceedings. The decree also removed any possibility of being released on bail in case of 'disturbance of public order' or threat to state security. In July 2001, the king revoked the decree but reaffirmed his attachment to a 1993 law suspending parole for certain press offences.

Sources: CIA – The World Factbook 2003; Freedom House; US State Department; Reporters Without Borders; Media Institute of South Africa

POPULATION & MORE FACTS

Population by age and sex

	All individuals		Male		Female	
	000	%	000	%	000	%
0-14	481	41	243	42	238	41
15-64	640	55	318	55	322	55
65+	41	4	18	3	23	4
Total	1,162	100	579	100	583	100

Source: CIA - The World Factbook 2003

	2002
Number of titles	
Total dailies	2
<i>National dailies</i>	2

Source: WAN from public sources

Top dailies (2002)

Title	Publisher	Format
The Times of Swaziland	African Echo (Pty) Ltd.	Tabloid
The Observer	Tibiyo Takangwane Trust	-

Source: Media Institute of South Africa

Commentary - Swedish Newspaper Publishers Association

General economic situation

In 2003 the Swedish economy finally took a turn for the better. The economy is getting stronger, albeit slowly. This was evident in newspaper advertising sales.

Performance of newspapers vs. other media

Swedish dailies increased advertising sales by a modest 0.5% (in comparable titles). Total advertising expenditure in traditional media (paid newspapers, magazines, TV, radio, cinema, and outdoor) increased 0.2%. Internet advertising shrank by 0.3%. Free newspapers went down by 2.2% while distribution of direct mail increased by 5.3%.

Performance of different types of newspapers

The increase in newspaper advertising sales was largely due to the success of the national evening tabloids. Morning newspapers as a group decreased by 0.6%. The evening tabloids increased advertising sales by 13.7%.

Newspaper launches/closures

There were no mergers of titles in 2003. Three non-daily titles closed and only one launched.

Advertising

In 2003 there was a recovery in display advertising. In the morning newspapers classifieds, and more particularly recruitment advertising, fell for another year and contributed to the overall decrease in that group of newspapers.

Quarter by quarter the recovery in advertising sales slowed down until the third quarter, which was the only quarter that was worse than the year before. Fortunately, in the fourth quarter advertising sales increased by enough to make the full year positive.

Circulation

Circulation was up by 0.1% for comparable titles. The national evening tabloids were the big circulation winners in 2003, with an increase of 2.6%. 15 titles were published on Sundays in 2003. Sunday circulation went down by 0.7%. There are no specific Sunday newspapers in Sweden.

Readership

Readership fell by a fraction of a percentage point but is still 88% on weekdays among the adult population in Sweden.

Online/digital publishing

71 of 91 dailies and 35 of 75 non-dailies have websites with editorial content. This is about the same as last year.

Ownership

Several structural changes took place 2003, mainly in areas with two competing local newspapers. Generally one can say that the aim has been to preserve the newspaper titles and the editorial departments, but to co-operate or join forces in other areas.

There have been no legal initiatives. The Competition Authority presented a report on media concentration in September 2003, but this has not had any political impact so far.

Media/press

The government has indicated that it will set up a government press commission, which will look into subsidies to the press, plurality and similar issues. After six months nothing has happened.

New proposals for more secrecy in official documents in different areas appear quite frequently and cause debate and criticism.

Otherwise our main concern is directed to the outcome of the planned EU legislation on applicable law (Rome II) and the implementation of the Market Abuse directive.

Copyright

The EU directive on "Copyright and neighbouring rights in the information society" is still to be implemented. The directive should have been implemented since long ago, but it now seems it will have to wait until at least the end of 2004.

Post

A state commission is overlooking the whole area of postal services. This will also cover the price setting of newspapers distributed by post and possible fields of co-operation in the distribution of newspapers.

Environment

Some more discussions have been held about recycling printed matters, in particular who should be responsible and who should be considered as "the producer".

POPULATION

Population by age and sex

	All individuals		Male		Female		Households 000
	000	%	000	%	000	%	
0-15	1,718	19	882	20	836	18	4,393
16-24	954	11	488	11	466	10	
25-34	1,165	13	593	13	572	13	
35-44	1,262	14	645	15	617	14	
45-54	1,180	13	597	13	583	13	
55-64	1,155	13	581	13	574	13	
65+	1,542	17	662	15	880	19	
Total	8,976	100	4,448	100	4,528	100	

Source: SCB - Statistics Sweden 2003

Population by annual income

SKr (000)	All adults		Male		Female	
	000	%	000	%	000	%
Less than 120	2,304	32	846	24	1,458	40
120-239	3,049	42	1,396	40	1,653	45
240-399	1,456	20	977	28	479	13
400+	370	5	301	9	69	2
Total	7,179	100	3,520	100	3,659	100

Source: SCB - Statistics Sweden (2001)



Households

Occupancy	Households	
	000	%
1 person	2,028	46
2 people	1,262	29
3 people	450	10
4 people	449	10
5 or more people	205	5
without children	3,309	75
with children	1,083	25
with children aged 0-6	480	11
with children aged 7-12	523	12
Total	4,393	100

Source: SCB - Statistics Sweden (2001)
Households are defined for tax purposes.
Cohabiting persons who are not married
and have no children are not counted as
a household.

Age structure of daily readership

Age	% of readership	% reach within age group
15-24	13	77
25-34	16	81
35-44	18	88
45-54	18	92
55-64	17	94
65-79	17	94

Source: Orvesto Konsument 2003, Research International

Newspaper reach (%)

	Daily
All adults	88
Men	87
Women	88

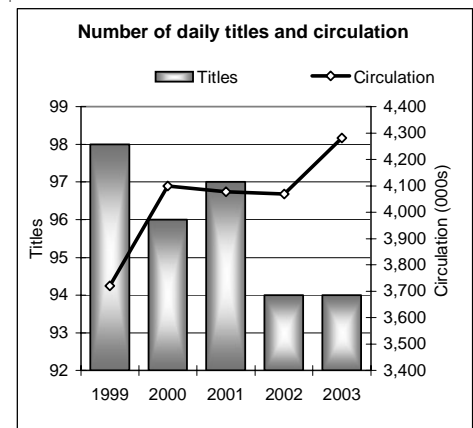
Source: Orvesto Konsument 2003, Research International

NUMBER OF TITLES AND CIRCULATION

	1999	2000	2001	2002	2003	Change (%)	
						99/2003	2002/03
Number of titles							
Total dailies*	98	96	97	94	94	-4.08	0.00
National dailies	4	4	4	4	4	0.00	0.00
Regional & local dailies	94	89	90	87	86	-8.51	-1.15
Free dailies	-	3	3	3	4	-	33.33
Non-dailies	71	109	108	115	116	63.38	0.87
National non-dailies	17	16	18	18	17	0.00	-5.56
Regional & local non-dailies	54	58	58	57	57	5.56	0.00
Free non-dailies	-	35	32	40	42	-	5.00
Circulation (000)							
Total dailies	3,721	4,100	4,078	4,068	4,282	15.09	5.26
National dailies	812	922	885	893	912	12.33	2.14
Regional & local dailies	2,909	2,778	2,799	2,778	2,756	-5.25	-0.80
Free dailies	-	400	393	397	614	-	54.66
Non-dailies	379	2,581	1,712	2,309	2,077	448.02	-10.04
National non-dailies	74	67	83	87	79	6.61	-9.20
Regional & local non-dailies	305	322	305	305	307	0.69	0.56
Free non-dailies	-	2,192	1,324	1,916	1,691	-	-11.76
Total annual sales (millions of copies)							
Dailies *	1,251	1,237	1,233	1,227	1,262	0.86	2.89
Non-dailies *	35	36	36	36	36	4.35	-0.83

Source: Tidningsstatistik AB

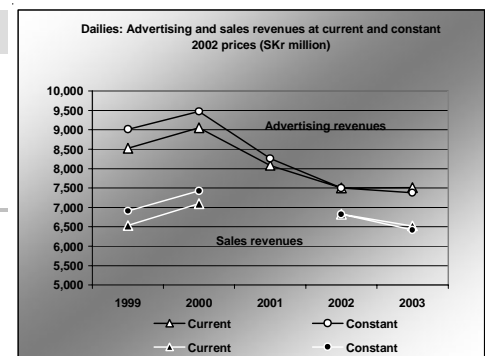
* excludes free newspapers, which are not audited in the same way as paid-fors



MORE FACTS

	1999	2000	2001	2002	2003	Change (%)	
						99/2003	2002/03
Advertising revenues (SKr million)							
Dailies	8,527	9,052	8,082	7,504	7,506	-11.97	0.02
Dailies §	9,015	9,477	8,259	7,504	7,381	-18.13	-1.65
National dailies	-	-	-	-	964	-	-
Regional & local dailies	-	-	-	-	6,542	-	-
Non-dailies	226	435	243	223	238	5.54	6.73
Free papers	833	991	953	939	942	13.09	0.32
Sales revenues (SKr million)							
Dailies	6,536	7,093	-	6,825	6,526	-0.15	-4.38
Dailies §	6,910	7,426	-	6,825	6,417	-7.14	-5.98
National dailies	-	-	-	-	2,265	-	-
Regional & local dailies	-	-	-	-	4,261	-	-
Non-dailies	-	83	-	94	114	-	21.02
National non-dailies	-	-	-	-	21	-	-
Regional & local non-dailies	-	-	-	-	93	-	-
Volume of advertising sold (pages & page equivalents in column metres)							
Total	832,038	847,580	764,795	730,508	721,491	-13.29	-1.23
In colour	358,608	421,247	396,035	366,979	402,845	12.34	9.77

§ at constant 2002 prices Includes classifieds and advertising tax, after discounts.



**Contribution of classified, display and insert advertising to total advertising income (%)**

	1999	2000	2001	2002	2003
Display	53.0	52.2	52.7	54.6	57.4
Classified	45.0	46.3	45.7	43.4	40.1
Inserts	2.0	1.5	1.6	1.9	2.5

Source: Swedish Newspaper Publishers' Association

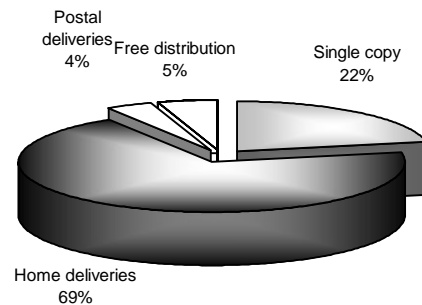
Distribution costs

	1999	2000	2001	2002	2003
As % of average cover price					
Single copy sales	21.5	21.5	21.5	21.5	-
Home deliveries *	-	-	-	44.1	-
Average distribution cost per copy (SKr)					
Single copy sales	-	-	-	2.50	2.50

Type of newspaper sales (%)

	Single copy	Home deliveries	Postal deliveries	Free distribution
1999	25	70	5	-
2000	24	71	5	-
2001	23	72	5	-
2002	24	72	4	-
2003	22	69	4	5

Source: Tidningsstatistik AB

Type of newspaper sales in 2003 (%)**Top ten dailies (2003)**

Title	Publisher	Circulation (000)	Readership (000)	Cover Price		Format	Full page rate (SKr)	
				SKr	US\$		Mono	Colour
Aftonbladet	Aftonbladet Hierta AB	442	1,420	8/13*	0.82-1.33	Tabloid	118,858	200,871
Dagens Nyheter	Dagens Nyheter AB	363	915	15	1.54	Broadsheet/Tabloid***	246,720	294,400
Expressen inklusive GT och Kvällsposten	AB Kvällstidningen Expressen	335	1,159	8/13*	0.82-1.33	Tabloid	95,200	152,320
Göteborgs-Posten	Göteborgs-Posten Nya AB	247	570	12/15**	1.23-1.54	Broadsheet/Tabloid***	188,160	254,730
Svenska Dagbladet	Svenska Dagbladet AB & Co	185	470	15	1.54	Tabloid	114,576	131,762
Sydsvenska Dagbladet Snällposten	Sydsvenska Dagbladets AB	136	320	15	1.54	Broadsheet/Tabloid***	131,138	177,206
Dagens Industri	Dagens Industri AB	115	444	20	2.05	Tabloid	89,900	119,900
Helsingborgs Dagblad...	Helsingborgs Dagblad AB	87	200	13/15**	1.33-1.54	Broadsheet	82,368	108,784
Nerikes Allehanda Nerikes-Tidningen	Nerikes Allehanda AB	64	156	15	1.54	Broadsheet	56,512	71,667
Östgöta Correspondenten	AB Correspondenten i Linköping	63	154	13	1.34	Broadsheet	52,864	65,864

* With supplement

** Sunday price

*** main sections broadsheet; other sections tabloid

Top advertising categories (2003)

Advertising sector	% of display ad revenue
Retail	38.6
Government & public advertising	14.1
Travel, tourism, transport	9.9
Auto	9.4
Others	8.3
Office supplies, computers	7.2
Banks, finance	4.2
Books, media, education	3.5
Non-brand advertising	2.5
Construction	2.3

Source: Research International

Top ten publishing companies (2003)

	Circulation	Revenue SKr (mill)
Bonnier AB	1,018,600	4,437
Schibsted	486,500	2,413
Tidnings AB Stampen	8,000	1,477
Nya Wermlands-Tidningen AB	110,800	691
Centertidningar AB	117,600	608
Gefle Dagblads Förvaltnings AB	126,900	586
Norrköpings Tidningars AB	62,600	575
Herenco AB	136,400	538
Sydostpress i Kalmar AB	121,500	469
VLT AB	48,000	441

Source: Presstödsnämnden, Tidningsstatistik AB

Top ten advertisers (2003)

Advertiser	Newspaper expenditure SKr (000)
Kooperativa Förbundet	319,564
ICA	310,824
Telia	210,348
Volvo	160,886
Volkswagen	125,624
Kungörelse Kommun Och Stat	116,142
Saab-Opel	111,745
Vodafone	106,481
Lindex	87,199
Föreningsparbanken	84,470

Source: Research International

Internet publishing (No. of online editions)

	1999	2000	2001	2002	2003
Dailies	66	67	79	77	71
Non-dailies	10	19	25	37	35

Online readership (page impressions per month)

Newspaper		2002	2003
Aftonbladet	aftonbladet.se	166,609,108	189,693,279
Dagens Nyheter	dn.se	58,431,168	75,662,657
Expressen	expressen.se	39,049,071	70,154,286
Dagens Industri	di.se	29,919,972	43,685,899
Göteborgs-Posten	gp.se	28,317,552	40,230,718

Source: Red Measure (KIA Index)

Figures are independently audited



Cover prices

	SKr
Single copy	10.00-20.00
Subscription	4.06-9.39

Source: Swedish Newspaper Publishers' Association

Employment & salary

	1999	2000	2001	2002	2003
Total no. of journalists	5,722	5,512	5,439	5,573	5,622
Part-time journalists	-	-	-	-	881
Total no. of employees	29,123	28,810	26,435	26,503	26,913
Part-time (included in total)	16,639	16,304	-	-	-
Total salary costs	SKr (000) 5,827,524	5,404,659	5,783,975	5,408,469	-

Newspaper colour capability & formats

Number of:	1999	2000	2001	2002	2003
4-colour newspapers	98	93	94	91	137
Broadsheets	33	31	30	30	32
Tabloids	45	41	44	44	92
Other	20	21	20	17	21

Note: 16 titles have provided no information about colour capability or format

Media consumption (minutes per day)

	1999	2000	2001	2002	2003
Newspapers	28	31	29	28	30
Magazines	18	20	17	14	15
Radio	133	129	127	124	117
Television	98	105	102	102	106
Internet	19	21	23	19	23

Source: Nordicom (Medie barometer 2003)
Individuals aged 9-79

CROSS MEDIA OWNERSHIP

Owners	Regional TV	National TV	Regional Newspapers	National Newspapers	Radio
Regional TV Licensees	No separate regional broadcast TV licences have so far been allocated	No legal obstacle but national transmissions require a licence from the government	Allowed	Allowed	Allowed
National TV Licensees	Regional TV transmissions allowed within the licence for national transmissions	As above	Allowed	Allowed	Allowed
Regional Newspaper Owners	No separate regional broadcast TV licences have so far been allocated	As above	Allowed	Allowed	Formally allowed, but will not get licenses in practice due to selection process based on plurality
National Newspaper Owners	As above	As above	Allowed	Allowed	Formally allowed, but will not get licenses in practice due to selection process based on plurality
Satellite TV Broadcasters	As above	As above	Allowed	Allowed	Allowed
Local radio Licensees	As above	As above	Allowed	Allowed	Allowed
Foreign Investors	As above	As above	Allowed	Allowed	Allowed

ADVERTISING EXPENDITURE & ECONOMIC DATA

Main economic indicators 1996-2002

	1996	1997	1998	1999	2000	2001	2002
1 US\$=	9.74						
	SKr at 2002 rate						
Gross Domestic Product (SKr billion)							
at current prices	1,817	1,890	1,974	2,079	2,197	2,267	2,340
% change	6.1	4.0	4.4	5.3	5.7	3.2	3.2
at 2002 prices	1,936	2,004	2,095	2,198	2,300	2,316	2,340
% change	5.5	3.5	4.5	4.9	4.7	0.7	1.0
Gross Domestic Product per capita (SKr 000)							
at current prices	205.6	213.6	223.0	234.6	247.7	256.7	265.0
at 2002 prices	219.1	226.5	236.7	248.0	259.3	262.3	265.0
Population							
Millions	8.8	8.9	8.9	8.9	8.9	8.8	8.8
Consumer Price Index							
2002=100	93.8	94.3	94.2	94.6	95.5	97.9	100.0
% change	0.5	0.5	-0.1	0.4	1.0	2.4	2.2
Ad.spend as a % of GDP							
	0.72	0.75	0.80	0.78	0.84	0.73	0.68
Advertising Expenditure Growth (%)							
at current prices	-0.1	8.3	11.0	3.1	13.8	-10.9	-3.9
at 2002 prices	-0.6	7.8	11.1	2.7	12.7	-13.0	-6.0

Source: IFS, ZenithOptimedia

**Advertising expenditure***(SKr millions, in current prices)*

	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
Newspapers	8,070	8,321	8,925	8,755	9,338	8,325	7,728	7,690	7,827	8,220	8,332
Magazines	1,626	1,826	2,155	2,251	2,614	2,391	2,217	2,330	2,481	2,593	2,617
Television	2,416	2,865	3,204	3,434	3,959	3,509	3,446				
Radio	319	416	517	536	592	508	472				
Cinema	82	83	74	70	78	79	79				
Outdoor	577	603	650	677	848	742	797				
Internet	-	61	207	497	1,037	895	1,066				
Total	13,090	14,175	15,732	16,220	18,466	16,449	15,805	15,874	16,434	17,179	17,639

Source: 1996-2002 IRM, 2003-2006 ZenithOptimedia

Notes: Includes classified, excludes agency commission and production costs, after discounts.

Research

Circulation is audited by: Tidningsstatistik AB

Readership is measured by: Research International

Methodology: Research International sends postal surveys to 47,972 people per annum in three sample periods.

Taxes

VAT on: sales 6% advertising 25%
 newsprint 25% plant 25%
 composition 25% (standard VAT rate 25%)

Advertising is subject to a tax rate of 4%. For free papers and magazines the tax is 11%. Billposting is tax-free. Companies pay a 28% tax on profits.

Subsidies

In 2002 direct subsidies paid to newspaper publishers totalled SKr 509 million, up from SKr 486 million the previous year. 85% were production grants.

Discounts

on: post 0 rail 0 telephone 0 telegraph 0 telex 0

Ownership

Does any law exist governing publishing-house ownership, or the registration of shares in newspaper-publishing companies? No

Is there any law prohibiting or restricting foreign companies or individuals from owning shares, and in particular, the majority of shares, of domestic daily newspapers? No

Is there any law prohibiting daily newspaper or periodical publishers

from operating radio or television stations in the same locality?

Newspaper companies are no longer strictly forbidden from running commercial radio stations. However, for reasons of pluralism, new legislation in this field means that commercial radio licences will, in practice, not normally be given to a daily newspaper that has a dominant position in its distribution area.

In a Bill to Parliament, the Government has suggested that these restrictions be abolished and replaced with new general criteria for the process of selecting to whom licences to run commercial radio should be granted. As these criteria are based on the assumption that pluralism should be promoted by this selection process, newspaper companies are still not likely to be able to get such licences.

So as to guarantee disclosure and transparency in the capital structure and to avert silent partnerships, is there a law or rule making it possible to determine who actually owns a publishing company? There are no special ownership transparency rules for the daily press. Every joint-stock company is obliged to register its shareholders. This register must be made available to anyone on request.

Is there an antitrust law limiting concentration in the daily press? No

Is further regulation of media concentration expected? No. There can be no further regulation until 2007 at the earliest, due to Swedish law requiring changes to the constitution (Press Freedom Act) to be voted on twice, with a general election in between.

Commentary – Schweizer Presse

According to comments made in the *Media Trend Journal*, 2003 is likely to go down in the history books as an *annus horribilis*. It was, and continues to be, dominated by negative figures, cost-cutting programmes and bad news on all fronts. In this respect, the refocusing work is not solely confined to the advertising market. Structural changes – such as the modified conditions under which media are used and the changing requirements of readers – require media providers to be on the look-out for new models of doing business. Daily newspapers in particular are searching for new approaches to enable them to remain competitive in the long term.

The advertising market

According to (net page) advertising statistics from the advertising media research company WEMF AG für Werbemedienforschung, advertising volumes in Swiss newspapers and magazines fell sharply in 2003, just as they did in the two previous years. Advertising volumes fell by 11.4% in newspapers. Most severely affected by the drop were the newspapers in German-speaking Switzerland, which printed 13.7% fewer ads in total. At 7.1%, the corresponding decrease in French-speaking Switzerland was much lower, and in Italian-speaking Ticino, it was lower still (at 5.2%). The fall in newspaper volumes was due in particular to a further decline in job ads.

Free newspapers almost maintained their advertisement volumes: they lost only 2.8% of 2002 volumes. Here too, the number of job ads fell sharply, but this was compensated by a 5.5% increase in other advertising. Throughout Switzerland, magazine ad volumes fell by 5.3%, with women's magazines

(11.8%) and the financial and business press (16.4%) hardest hit.

Forecasts for 2004 are moderately positive. At least there are many people who believe that the nadir in the market has been reached. The question is just how long this will last and how strong the subsequent rise will be.

Readership

Practically all newspapers and magazines recorded an increase in readership last year; this can be explained by a minor amendment to research methods and by the greater demand for information following 11 September and during the run-up to war in Iraq. Readership figures have also benefited from the supply of free newspapers: the commuter newspaper *20 Minuten* increased its readership by almost 200,000 (or 36%), although this was partly the result of the discontinuation of its rival *Metropol*. *20 Minuten* is currently the second most widely-read daily newspaper in Switzerland.

Print media in the media market as a whole

Gross advertising expenditure figures provided by Media Focus highlight how differently the different media have performed. Expenditure on print fell by 4.7% (SF 116 million); print's market share was 64.3% (newspapers 40.2%, magazines 18.5% and specialist press 5.6%). In contrast, spending on radio and television advertising rose by 4.8% (market share 22.4%). Outdoor advertising decreased by 5.2% (SF 22 million) while cinema advertising rose 13.3% (SF 5 million). Internet advertising appears to have advanced too, although comparisons are not possible for methodological reasons.

POPULATION

Population by age and sex

	All individuals		Male		Female		Households
	000	%	000	%	000	%	
Children	1,317	18	678	19	639	17	3,116
16-24	780	11	397	11	383	10	
25-34	997	14	492	14	505	13	
35-44	1,233	17	619	17	614	16	
45-54	1,025	14	516	14	509	14	
55-64	867	12	429	12	438	12	
65+	1,149	16	474	13	675	18	
Total	7,368	100	3,605	100	3,763	100	

Source: Bundesamt für Statistik, Sektion Bevölkerungsentwicklung, provisorische Ergebnisse 11.2.2004, Eidgenössische Volkszählung 2000 Census

Population by social class and sex

	All adults		Male		Female	
	000	%	000	%	000	%
A+B	388	6	287	10	101	3
C1	996	16	649	22	347	11
C2	1,040	17	516	17	524	17
D	1,386	23	703	24	683	22
E	2,254	37	795	27	1,459	47
Total	6,064	100	2,950	100	3,114	100

Source: Eidgenössische Volkszählung, 2000, © BFS, Neuchâtel 2004

A= higher managerial, administrative, professional

B= intermediate managerial, administrative, professional

C1= supervisory/clerical/junior managerial

C2= skilled manual workers

D= semi and unskilled manual workers

E= subsistence/state pensioners or widows

Does not include children upto 15 years old

Housewives (co-habiting persons)

	Housewives	
	000	%
under 25	114	4
25-34	544	17
35-44	686	22
45-54	607	19
55-64	501	16
65+	664	21
Total	3,116	100

Source: Eidgenössische Volkszählung, 2000, © BFS, Neuchâtel 2004

Newspaper reach (%)

	Daily
All adults	74.8
Men	78.2
Women	71.5
MHS	73.5

Source: MACH Basic 2003, WEMF AG

für Werbemedienforschung,

Zurich dailies and non-dailies

MHS: Main Household Shopper



Households

Occupancy	Households	
	000	%
1 person	1,121	36
2 people	986	32
3 people	403	13
4 people	410	13
5 or more people	196	6
without children	2,056	66
with children	1,060	34
with children aged 0-3	248	
with children aged 4-9	363	
with children aged 10-15	359	
with children aged 16+	462	
Total	3,116	100

Source: Eidgenössische Volkszählung, 2000, © BFS, Neuchâtel 2004

Age structure of daily readership

Age	% of readership	% reach within age group
0-16	2	55.9
16-24	13	68.1
25-34	19	71.0
35-44	19	75.9
45-54	16	79.9
55-64	14	81.4
65+	17	78.4

Source: MACH Basic 2003, WEMF AG für Werbemedienforschung, Zurich dailies and non-dailies

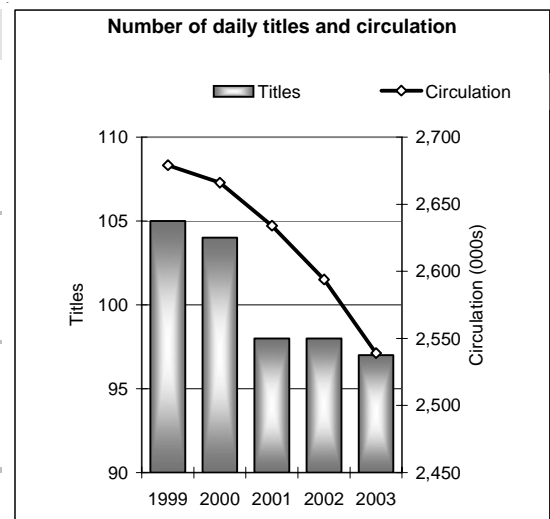
NUMBER OF TITLES AND CIRCULATION

	1999	2000	2001	2002	2003	Change (%)	
						99/2003	2002/03
Number of titles							
All newspapers	233	232	224	224	216	-7.30	-3.57
Regional/local dailies	105	104	98	98	97	-7.62	-1.02
Regional/local non-dailies	124	124	122	121	115	-7.26	-4.96
Sundays	4	4	4	5	4	0.00	-20.00
Free papers	391	406	429	392	-	-	-
Circulation (000)							
Circulation*	4,227	4,214	4,106	4,158	3,918	-7.31	-5.77
Regional/local dailies	2,679	2,666	2,634	2,594	2,539	-5.23	-2.12
Regional/local non-dailies	721	723	655	597	541	-24.97	-9.38
Sundays	827	825	817	968	838	1.33	-13.43
Total annual sales (millions of copies)							
Total annual sales/distribution	913	906	892	884	857	-6.13	-3.05
Regional/local dailies	813	805	796	783	767	-5.66	-2.04
Regional/local non-dailies	57	57	54	50	46	-19.30	-8.00
Sundays	43	44	42	50	44	2.33	-12.00

Source: Titelstatistik Verband SCHWEIZER PRESSE

* Average circulation per issue

Note: Switzerland has no national newspapers, because different languages are spoken in different parts of the country.



MORE FACTS

	1999	2000	2001	2002	2003	Change (%)	
						99/2003	2002/03
Advertising revenues (Swiss Francs million)							
Dailies	1,669	1,784	1,673	1,391	1,418	* 1.94	-15.04
Dailies §	1,723	1,813	1,684	1,391	1,410	* 1.33	-18.19
Non-dailies & Sundays	185	188	186	209	213	* 1.94	15.16
Free papers	265	277	291	263	268	* 1.94	1.17
Volume of advertising sold (pages & page equivalents)							
Total	217,689	231,656	211,136	177,984	157,739	-11.37	-27.54
In colour	129,458	150,487	145,979	59,661	-	-	-

§ at constant 2002 prices * WAN/ZenithOptimedia estimates

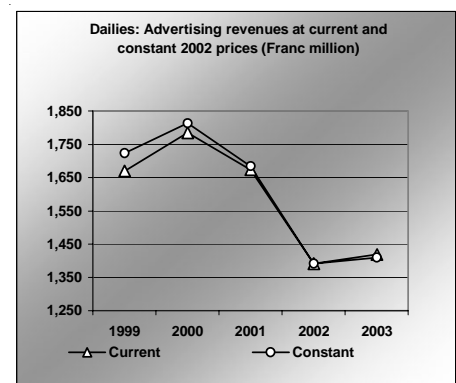
Source: Werbestatistik Schweiz, WEMF AG für Werbemedienforschung, Zurich

Inseratstatistik VSW/Schweizer Presse

The numbers include all Newspapers: dailies, non-dailies, sundays and free newspapers. All numbers are without productions costs. All figures include classifieds.

The volumes figures are for all newspapers.

Advertising revenue figures are net of volume and repetition discounts, but not agency discounts since these are negotiated privately.



Distribution costs

	1998	1999	2000	2001	2002	2003
As % of average cover price						
Single copy sales	40-45	40-45	40-45	40-45	40-45	40-45

Source: Verband Schweizer Presse

Cover prices

	Euro	SF
Single copy	0.91-1.37	1.43-2.15
Subscription	0.51-0.65	0.81-1.02

Source: Abo- & EV-Preisstatistik

Verband SCHWEIZER PRESSE

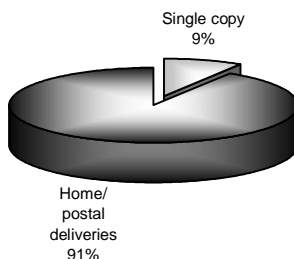


Type of newspaper sales (%)

	Single copy	Home/postal deliveries
1998	10	90
1999	10	90
2000	10	90
2001	10	90
2002	10	90
2003	9	91

Source: Verband Schweizer Presse

Type of newspaper sales in 2003 (%)



Contribution of classified and display advertising to total advertising income (%)

	2003
Display	61.0
Classified	34.9
Inserts	4.1

Source: AIS Advertising Index Switzerland, WEMF AG für Werbemedienforschung, Zurich

Top ten advertisers (2003)

Advertiser	Newspaper expenditure SF (Mill)
Migros	105.5
Coop	75.1
Denner	25.6
Media Markt	22.6
Manor	22.2
Fust	21.1
Frimago	20.0
Credit Suisse	14.1
Orange	13.6
TDC Switzerland	13.5

Source: Media Focus, Hergiswil/NW, February 2004 without publishers firms and groups of companies.

The numbers include all Newspapers : dailies, non-dailies, sundays and free newspapers

Media consumption (minutes per day)

	1999	2000	2001	2002	2003
Newspapers	48	50	51	49	47
Magazines	30	30	31	27	25
Radio	83	84	85	86	90
Television	89	88	90	91	93
Internet	13	22	25	30	28

Source: Mediatrack, D&S Markt- und Kommunikationforschung, Zurich, Self declaration by a representative group of persons in Switzerland, aged between 15 and 74 year old Published by Media Trend Journal, Trends 2004

Employment & salary

	2000
Total no. of Journalists	10,597
Total no. of Employees	32,322

Source: Eidgenössische Volkszählung, 2000, © BFS, Neuchâtel 2004

Top ten advertising categories (2003)

Advertising sector	Display ad revenues (%)
Media	21.8
Politic	18.5
Automobile	12.5
Industrial/Trade/Wholesale	8.2
Financial	7.1
EDV/Offices	7.0
Household/Garden	4.7
Services	4.2
Leisure time/Tourist industry	2.9
Clothing industry	2.8

Source: Media Focus, Hergiswil/NW, February 2004

The numbers include all Newspapers : dailies, non-dailies, sundays and free newspapers

Top ten publishing companies (2002)

	Total revenue SF (Mill)
Ringier AG	1,033
Edipresse Publications SA	706
Tamedia AG	640
NZZ Gruppe	482
Basler Zeitung Medien	312
Espace Media Groupe	233
AZ Medien Gruppe	198
Südostschweiz Mediengruppe	141
LZ Medien Gruppe	122
Vogt-Schild/Habegger Medien AG	87

Source: Media Trend Journal 6/2003, Top Medienunternehmen Schweiz

Online readership (page impressions)

Newspaper	Web URL	2003*
Neue Zürcher Zeitung	www.nzz.ch	15,779,974
Tages-Anzeiger	www.tagesanzeiger.ch	13,601,867
Le Matin	www.lematin.ch	3,041,927
Berner Zeitung	www.espace.ch	2,325,996
Basler Zeitung	www.baz.ch	2218065

Source: Net-Audit, WEMF AG für Werbemedienforschung, Zurich

* December 2003. Not all newspaper websites measured

Top ten dailies (2003)

Title	Publisher	Circulation (000)	Readership (000)	Cover Price		Format	Full page rate (SF)	
				SF	US\$		Mono	Colour
Blick	Ringier AG	292	746	1.80	1.15	32 x 47 cm	20,440	30,033
Tages-Anzeiger	Tamedia AG	235	559	2.50	1.60	32 x 47 cm	14,672	23,206
Mittelland Zeitung	Aargauer Zeitung AG	194	366	2.50	1.60	32 x 47 cm	20,051	28,218
Neue Zürcher Zeitung	Neue Zürcher Zeitung AG	166	324	2.50	1.60	32 x 47 cm	12,761	19,163
Berner Zeitung	Espace Media Groupe	163	341	2.50	1.60	32 x 47 cm	18,566	25,796
Die Südostschweiz	Südostschweiz Presse AG	138	243	2.20	1.41	32 x 47 cm	15,840	19,688
Neue Luzerner Zeitung	Neue Luzerner Zeitung AG	133	289	2.50	1.60	32 x 47 cm	12,979	17,997
St. Galler Tagblatt	St. Galler Tagblatt AG	110	226	2.00	1.28	32 x 47 cm	10,996	15,336
Basler Zeitung	National-Zeitung und Basler Nachrichten AG	104	226	2.50	1.60	32 x 47 cm	11,652	15,852
24 heures	Edipresse Publications SA	89	243	2.00	1.28	32 x 47 cm	8,536	15,168

Source: Auflagenbulletin 2003, WEMF AG für Werbemedienforschung

MACH Basic 2003, WEMF AG für Werbemedienforschung

Prices net exkl. VAT Rate 2004, VSE-ASSP

Verband SCHWEIZER PRESSE



ADVERTISING EXPENDITURE & ECONOMIC DATA

Advertising expenditure	(SF millions, in current prices)							2003	2004	2005	2006
	1996	1997	1998	1999	2000	2001	2002				
Newspapers	1,850	1,850	1,926	2,118	2,250	2,150	1,863	1,900	1,919	1,925	1,944
Magazines	621	594	640	717	783	736	683	690	704	713	725
Television	343	370	402	486	520	494	527				
Radio	106	107	114	120	139	129	129				
Cinema	37	39	40	42	45	40	38				
Outdoor	448	447	468	502	592	603	571				
Internet	0	0	6	12	25	19	20				
Total	3,405	3,407	3,596	3,997	4,354	4,171	3,831	3,988	4,093	4,179	4,264

Source: 1996-2002 Stiftung Werbestatistik Schweiz, 2003-2006 ZenithOptimedia

Notes: Excludes agency commission and production costs, includes classified advertising, after discounts

Main economic indicators 1996-2002

	1996	1997	1998	1999	2000	2001	2002
1 US\$=	1.56						
SF at 2002 rate							
Gross Domestic Product (SF billion)							
at current prices	366	371	380	389	406	415	417
% change	0.7	1.5	2.3	2.2	4.4	2.3	0.5
at 2002 prices	383	387	395	401	412	418	417
% change	0.6	1.0	2.2	1.4	2.8	1.3	-0.2
Gross Domestic Product per capita (SF 000)							
at current prices	51.7	52.4	53.4	54.5	56.6	57.4	57.6
at 2002 prices	54.2	54.6	55.6	56.2	57.5	57.8	57.6
Population							
Millions	7.1	7.1	7.1	7.1	7.2	7.2	7.2
Consumer Price Index							
2002=100	95.5	96.0	96.1	96.9	98.4	99.3	100.0
% change	0.8	0.5	0.1	0.8	1.6	1.0	0.7
Ad.spend as a % of GDP	0.93	0.92	0.95	1.03	1.07	1.01	0.92
Advertising Expenditure Growth (%)							
at current prices	-2.4	0.1	5.5	11.2	8.9	-4.2	-8.2
at 2002 prices	-3.2	-0.4	5.4	10.3	7.3	-5.1	-8.8

Source: IFS, ZenithOptimedia

Research

Circulation is audited by: WEMF AG für Werbemedienforschung
 Readership is measured by: WEMF AG für Werbemedienforschung
 Methodology: MACH Basic (National Readership Survey of Switzerland)
 Permanent survey with 23,500 interviews (CATI) per year, focusing on use of newspapers, magazines, cinema and the internet. Results are published once a year. Universe: individuals 14+, living in a private household, able to speak the local language.

Taxes

VAT on: sales 2.4% advertising 7.6%
 newsprint 7.6% plant 7.6%
 composition 7.6% (standard VAT rate 7.6%)

Subsidies

Are there subsidies for the purchase of newsprint? No

Are loans granted at low interest rates for re-equipping or improving existing equipment? No

Discounts

on: post 15-30% rail 0 telephone 0 telegraph 0 telex 0

Ownership

Does any law exist governing publishing-house ownership, or the registration of shares in newspaper-publishing companies? Yes, if so required under the Cartel Act described below.

Is there any law prohibiting or restricting foreign companies or individuals from owning shares, and in particular, the majority of shares, of domestic daily newspapers? No

Is there any law prohibiting daily newspaper or periodical publishers from operating radio or television stations in the same locality? No, but a publisher may not offend the 'diversity of opinions' provision set out in Article 10 of the Radio and Television Law. This law is currently under revision.

So as to guarantee disclosure and transparency in the capital structure and to avert silent partnerships, is there a law or rule making it possible to determine who actually owns a publishing company? According to article 322 of the Swiss Penal Code, newspapers and magazines must indicate important holdings in other companies in the printer's imprint, in addition to other details. For public companies there are some general rules requiring declaration and/or publication of big shareholders (article 20 Swiss Stock Exchange Act, article 663c Swiss Code of Obligations).

Is there an antitrust law limiting concentration in the daily press? Yes - article 9 of the Cartels Act, or Kartellgesetz:

- i. The Competition Commission must be told in advance of mergers that on the basis of the most recent accounts would create a joint enterprise which
 - a. had turnover of SF 2 billion or more at home and abroad, or SF 500 million or more at home, and
 - b. in which two or more participating companies had individual turnovers of SF 100 million or more.
- ii. A clause specifying much lower qualifying revenue for media companies has now been deleted.
- iii. Notwithstanding paragraph (i) above, notification is mandatory if a court finds that one of the participating companies already dominates the market in question, or a connected market.
- iv. The Federal Assembly may, by way of a decree not subject to referendum, adjust the amounts in paragraph (i) above according to changed circumstances, or establish special criteria for notification of concentrations in certain branches of the economy.

Is further regulation of media concentration expected? Yes

General economic situation

GDP total US\$63.48 billion; GDP per capita US\$3,610 (purchasing power parity; 2002). Consumer price index 100.9 (2002).

Performance of newspapers vs. other media

The state has had a virtual monopoly over Syria's press and broadcasting media since the Baath military coup of 1963. The government or the Baath Party owned and operated the radio and television companies and most of the newspaper publishing houses. The Ministry of Information closely monitored radio and television news programmes to ensure adherence to the government line. The government did not interfere with broadcasts from abroad. Satellite dishes have proliferated throughout all regions and in neighbourhoods of all social and economic categories, and in 2001 the Minister of Economy and Foreign Trade authorised private-sector importers to import satellite receivers and visual communication systems. One survey, according to the BBC, found that 22% of consumers in Damascus and Aleppo – Syria's two largest cities – have satellite dishes.

Performance of different types of newspapers

A few privately owned newspapers published in 2002; foreign-owned, foreign-published newspapers continued to circulate relatively freely.

Newspaper launches/closures

In 2001 the government allowed six political parties to start their own newspapers. In January 2001 the government permitted publication of the National Progressive Front's (NPF) Communist Party newspaper *The People's Voice*. It became the first private paper distributed openly since 1963. In February 2001 the government permitted publication of the NPF's Union Socialist Party's private newspaper *The Unionist*. Also in February 2001 the government permitted the publication of a private satirical weekly newspaper *At-Domari (The Lamplighter)*, which criticized politically non-sensitive instances of government waste and corruption. In June 2001 the government permitted the publication of the private weekly newspaper *The Economist*, which was critical of the performance of the government.

In 2002, the government licensed at least three additional private publications – an insurance magazine, an advertising publication, and a political-cultural called magazine *Abyad wa Aswad* ('Black and White'), which is run by the son of the country's army chief of staff.

Media/press laws

The Emergency Law prohibits the publication of "false information", which opposes "the goals of the revolution". Penal Code articles prohibit "attempting to illegally change the Constitution," "preventing authorities from executing their responsibilities," and "acts or speech inciting confessionism". In August 2001 the government amended the Press Law to permit the reestablishment of publications that were circulated prior to 1963 and established a framework in which the National Front Parties, as well as other approved private individuals and organizations, would be permitted to publish their own newspapers. However, the same amendments also stipulated imprisonment and stiff financial penalties as part of broad, vague provisions prohibiting the publication of "inaccurate" information, particularly if it "causes public unrest, disturbs international relations, violates the dignity of the state or national unity, affects the morale of the armed forces, or inflicts harm on the national economy and the safety of the monetary system". Persons found guilty of publishing such information were subject to prison terms ranging from 1 to 3 years and fines ranging from US\$10,000 to US\$20,000 (500,000 to 1 million Syrian pounds). The amendments also imposed strict punishments on reporters who do not reveal their government sources in response to government requests.

The Ministry of Information and the Ministry of Culture and National Guidance censored domestic and imported foreign press. They usually prevent the publication or distribution of any material deemed threatening or embarrassing to high levels of the government by the security services. Censorship usually was stricter for materials in Arabic. Commonly censored subjects included: the government's human rights record; Islamic fundamentalism; allegations of official involvement in drug trafficking; aspects of the government's role in Lebanon; graphic descriptions of sexual activity; material unfavourable to the Arab cause in the Middle East conflict; and material that was offensive to any of the country's religious groups.

In 2002 the government set out conditions for licensing private, commercial FM radio stations, but it ruled that the stations could not broadcast news or political content.

Sources: CIA – *The World Factbook 2003*; US State Department; *Committee to Protect Journalists*; *Stanhope Centre UK*

POPULATION & MORE FACTS

Population by age and sex

	All individuals		Male		Female	
	000	%	000	%	000	%
0-14	6,785	39	3,494	39	3,291	38
15-64	10,230	58	5,238	58	4,992	58
65+	571	3	275	3	296	3
Total	17,586	100	9,007	100	8,579	100

Source: CIA – *The World Factbook 2003*

Top dailies (2002)

Title	Publisher
Al-Baath	Al-Baath Arab Socialist Party
Al-Thawra	Government
Tishrin	-
Syria Times	-

Source: WAN from public sources

Commentary - Government Information Office

On January 1 1988 Taiwan liberalised newspaper registration, releasing long-suppressed and hidden creativity. Print media increased the number of pages and diversity of content, and improved layout design and printing techniques, thereby enhancing papers' readability. From that time, the newspaper industry entered a competitive era characterised by liberalisation and diversity, becoming one important driving force in the promotion of Taiwan's democratic development and social progress. According to the latest statistics, there are 130 newspapers in Taiwan, of which, more than 80 are located in northern Taiwan (Miaoli, Hsinchu, Taoyuan and further north) and account for more than half of all media. This shows that the north is still Taiwan's media centre, as well as being the hub for collection and distribution of political, economic and cultural information.

Generally speaking, the most competitive national publications are part of media holding groups. The largest three are the *China Times*, *United Daily News*, and *Liberty Times*. The *China Times* is the main publication of the China Times Group, which also owns the *Chinatimes Express* and *Commercial Times*. The *United Daily News* is the flagship publication of the United Daily News Group, whose other publications include the *United Evening News*, *Economic Daily News*, *Min Sheng Daily* and *Star*, while it reaches overseas Chinese with the *World Journal* in New York, *Europe Journal* in Paris and the *Universal Daily News* in Bangkok. The *Liberty Times* rose to prominence in 1994, and was later joined by its sister English-language daily the *Taipei Times*, which, with its attractive layout and diverse topics, gained much attention from foreigners in Taiwan. The *Taipei Times*'s website has become an important source of information for overseas journalists collecting news about Taiwan.

In April 2003, the Hong Kong-based *Apple Daily News* began publication in Taiwan. This newspaper's methods of staff hiring, distribution, layout and marketing were all new and creative. Moreover, its shift from a focus on political news, to picture-driven editorial logic, eye-catching colour photos, and sensational and exaggerated headlines, have all contributed to its large readership, and forced the three major local newspapers to prepare for battle by changing their layouts, and merging, integrating or diversifying their business operations.

Newspapers in Taiwan can be divided into two broad categories: general and specialised. General newspapers tend to cover the whole range of news: political, economic, social, culture, sports, international, local, entertainment, leisure and travel. The four papers mentioned above belong to this category, as do the *Central Daily News*, *Chinese Daily News*, *Taiwan Daily News*, *Taiwan Times*, and *Merit Times Daily News*. Of these, the *Central Daily News* and *Chinese Daily News* are run by the Kuomintang and, being tinted by this party political propaganda, are less market competitive. Established in 2000, the *Merit Times Daily News* is Taiwan's first general interest newspaper founded by a Buddhist group and positions itself as a defender of straight news reporting.

As regards Taiwan's specialised newspapers, the most conspicuous developments have been in finance/economy and leisure/culture newspapers. In the financial category, the two major newspapers are the *Commercial Times* and *Economic Daily News*, which belong to the China Times Group and United Daily News Group respectively, and are read mainly by people

in the business and industrial sectors. In addition, although the circulation of *Wealth News* is not large, because of its large column space dedicated to information about the stock market it is read by ordinary investors. As for the leisure and cultural category, the *Great Entertainment Daily* and *Star*, both of which give priority emphasis to movie and drama news, and the *Min Sheng Daily*, which covers movies, drama and sport, all have clear positions and stable readerships, and are especially popular with young readers. Since the popularity of sports in Taiwan is still at an early developmental stage, no paper dedicated to sports is published at present.

Despite the market advantages enjoyed by the large general and specialised newspapers, people's concern for news regarding their own neighbourhood means that there remains space for development of regional newspapers. Important newspapers in southern Taiwan include the *China Daily News*, *Commons Daily*, *Taiwan Times*, *Taiwan News* (a separate publication from the English-language paper of the same name), and *Taiwan Shin Sheng*. The eastern counties of Hualien and Taitung have the *United Federal Daily News* and *Keng Sheng Daily*, and the offshore islands have the *Penghu Times*, *Kin-Xia Post* and *Matsu Daily*. The *Commons Daily*, which targets the Greater Kaohsiung area, was bought by the Eastern Multimedia Corporation group in 2000 as part of the group's expansion of its print, electronic and online activities.

Furthermore, with completion of the main lines of Taipei's mass rapid transit (MRT) system and the concomitant changes in metropolitan lifestyles, several newspapers such as the *Metro Times* and *Taipei Quickly Express* have launched to target MRT commuters.

Taiwan's newspaper industry has its own special features compared with its foreign counterparts. For example, although Taiwan is not large, it has three English-language newspapers: the *China Post*, *Taipei Times*, and *Taiwan News*. This is unique for a non-English speaking area or country. Taiwan currently has two evening newspapers published in the afternoon: the *Chinatimes Express* and *United Evening News*.

The widespread establishment of 24-hour convenience stores over recent years (there are more than 5,000 such stores), which provide convenient retail channels for newspapers, have reduced the ratio of newspaper subscriptions to retail sales from 8:2 a decade ago to 5:5 today (in particular, the retail rate for *Apple Daily* is over 95%). As a result, in order to secure their market share, newspapers have started giving away free copies, discounting cover prices, offering promotional gifts and running raffle games to attract more readers.

According to a survey undertaken by AC Nielsen, rates of newspaper readership in Taiwan have declined from 76.3% five years ago to around 50% in 2003. The main reasons for this are the same as in other countries: the revolution in broadcasting technology, proliferation of channels, and the growth of the internet. Traditional newspapers fail to catch the attention of a new generation of readers used to sophisticated audiovisual effects, immediate information and interactive dialogue. The news-reporting function of newspapers has been weakened by the development of numerous news channels after the Cable Radio and Television Act was passed in 1993. News channels, most of which broadcast around the clock, now account for about a tenth of all the television channels in Taiwan. All newspapers are



investigating the potential of the internet for their business, and most have already established online editions.

Taiwan's press media retain irreplaceable advantages, however. These include the provision of in-depth, eloquent and logical knowledge and information; the clear presentation of issues and advancement of reporting; and the pool of experience in gathering and editing information that is better than that of reporters in other media.

An outline of future developments can be inferred from the current situation. Major newspapers will continue to maintain their market share, while public and party-run newspapers will transform rapidly under the impact of market competition. Multimedia corporations, cross-industry alliances, and reinvestment in online publications will become even more common. Retail sales of newspapers will remain the main distribution channel in metropolitan areas, with specialised papers finding a niche outside the mass market.

POPULATION

Population by age and sex (2002)

	All individuals		Male		Female		Households 000
	000	%	000	%	000	%	
Children	4,597	20	2,396	21	2,201	20	6,802 *
16-24	3,684	16	1,892	16	1,792	16	
25-34	3,701	16	1,879	16	1,822	17	
35-44	3,808	17	1,931	17	1,877	17	
45-54	3,067	14	1,541	13	1,526	14	
55-64	1,620	7	795	7	825	7	
65+	2,024	9	1,042	9	982	9	
Total	22,501	100	11,476	100	11,025	100	

Source: Ministry of the Interior

* 2001 data

Working population by social class and sex (2001)

	Adults		Male		Female	
	000	%	000	%	000	%
A	413	4	356	6	57	1
B	638	7	325	6	313	8
C	1,639	17	964	17	675	17
D	1,042	11	229	4	813	21
E	1,779	19	809	15	970	25
F	714	8	519	9	195	5
G	3,197	34	2343	42	854	22
Total	9,422	100	5,545	100	3,877	100

Source: Directorate General of Budget and Statistics,

Executive Yuan, R.O.C.

A= legislators, administrators, business execs., managers

B= professionals

C= technicians and associate professionals

D= clerks

E= service workers, shop and market sales assistants

F= agricultural, animal husbandry, forestry and fishing workers

Age structure of readership (2003)

Age	% of readership	% reach within age group
25-34	24.0	53.0
35-44	26.7	57.3

Source: Nielsen Media Research Media Index 2003

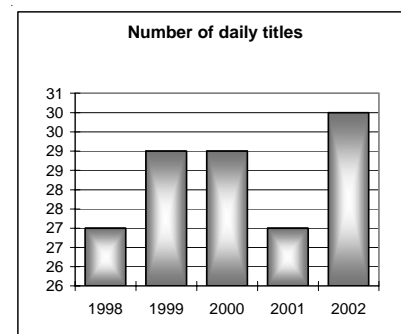
Newspaper reach (%)

	Daily
All adults	51.7
Men	50.3
Women	50.0

NUMBER OF TITLES AND CIRCULATION

	1998	1999	2000	2001	2002	Change (%)	
						98/2002	2001/02
Number of titles							
National dailies	27	29	29	27	30	11.11	11.11

Source: Government Information Office, Republic of China



MORE FACTS

Top ten advertisers (2002)

Advertiser	Newspaper expenditure NT\$ (000)
Ford	236,622
Ho Tai Motor Co.	224,137
Mitsubishi	221,896
YULON Motor Co.	202,727
Chunghwa Telecom.	152,792
Cathay Real estate	143,395
Taiwan Cellular Corporation	133,395
Bao Sheng estate	103,795
Chinatrust Commercial Bank	102,388
Carrefour	100,668

Source: Rainmaker Industrial Ltd

Note: Foundation and Government organisations not included.

Estimated effective adspend has already deducted the amount of related discount, sale package, barter and bonus.

Classifieds are not included.

Top ten advertising categories (2002)

Advertising sector	% of display ad revenue
Property	25.80
Auto	12.04
Financial institutions	4.08
Mobile phone services	3.39
Furniture	2.97
Department stores	2.71
Credit cards	2.29
Airlines/travel	1.71
Warehouses	1.59
Hotels	1.42

Source: Rainmaker Industrial Ltd

Note: Foundation and Government organisations not included.

Estimated effective adspend has already deducted the amount of related discount, sale package, barter and bonus.

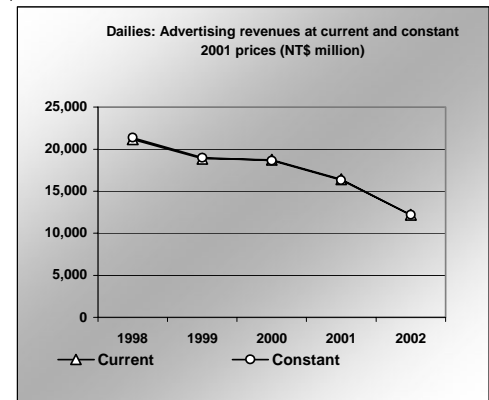
Classifieds are not included.



	1998	1999	2000	2001	2002	Change (%)	
						98/2002	2001/02
Advertising revenues (NT\$ million)							
All newspapers	21,157	18,858	18,746	16,414	12,196	-42.36	34.59
All newspapers \$	21,359	19,001	18,652	16,332	12,196	-42.90	33.91

§ at constant 2001 prices

Figures include advertising agency commission



Top ten dailies (2001)

Title	Readership (000)
Liberty Times	4,301
China Times	5,052
United Daily	4,260
Ming Shang Pao	1,463
United Evening	752
China Times Express	641
The Great News Entertainment	-
China Daily News	-
Taiwan Times	494
Taiwan Daily	-

Source: AC Nielsen Media Index July-Dec 2001

Media consumption (minutes per day)

Adults	2003
Newspapers	5
Radio	18
Television	26
Internet	15

Source: Nielsen Media Research Media Index 2003

ADVERTISING EXPENDITURE & ECONOMIC DATA

Advertising expenditure

(NT\$ million, in current prices)

	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
Newspapers	12,799	18,063	21,157	18,858	18,746	21,690	14,580	14,871	15,615	16,239	16,564
Magazines	3,987	4,837	5,886	6,099	7,200	7,071	8,210	8,620	9,051	9,323	9,509
Television	24,306	25,685	34,832	32,234	30,670	31,923	38,040				
Radio	2,200	2,500	2,750	2,146	2,310	3,135	3,606				
Outdoor/Transport	-	-	-	-	-	-	-				
Internet	-	-	-	-	870	850	952				
Total	43,292	51,085	64,625	59,337	59,796	64,668	65,387	70,410	75,473	79,066	81,869

Source: 1996-98 Rainmaker Research, 1999-2001 National Statistics Bureau, 2002 Rainmaker Research 2003-2006 ZenithOptimedia

Notes: Includes agency commission, excludes production costs

1996-2005: excludes recruitment, classified and charity ads, after discounts, radio is a ZenithOptimedia estimate

Main economic indicators 1996-2002

	1996	1997	1998	1999	2000	2001	2002
1 US\$=	34.50						
Gross Domestic Product (NT\$ billion)							
at current prices	7,678	8,329	8,939	9,290	9,663	9,542	9,836
% change	9.4	8.5	7.3	3.9	4.0	-1.3	3.1
at 2002 prices	7,953	8,550	9,024	9,360	9,615	9,495	9,836
% change	6.1	7.5	5.5	3.7	2.7	-1.3	3.6
Gross Domestic Product per capita (NT\$ 000)							
at current prices	357.6	384.1	408.7	421.7	434.9	427.1	440.3
at 2002 prices	370.4	394.3	412.6	424.9	432.7	425.0	440.3
Population							
Millions	21.5	21.7	21.9	22.0	22.2	22.3	22.3
Consumer Price Index							
2002=100	96.5	97.4	99.1	99.2	100.5	100.5	100.0
% change	3.1	0.9	1.7	0.2	1.3	0.0	-0.5
Ad.spend as a % of GDP							
	0.56	0.61	0.72	0.64	0.62	0.68	0.66
Advertising Expenditure Growth (%)							
at current prices	-46.5	18.0	26.5	-8.2	0.8	8.1	7.7
at 2002 prices	-48.1	16.9	24.4	-8.4	-0.5	8.1	8.3

Source: IFS, ZenithOptimedia

Taxes

VAT on: advertising 5% (normal VAT rate 5%)

Subsidies

Are there subsidies for the purchase of newsprint? No

Are loans granted at low rates for re-equipment and improvement of existing equipment? No

Are there any direct subsidies? No

Ownership

Does any law exist governing publishing-house ownership, or the registration of shares in newspaper-publishing companies? No

Is there any law prohibiting or restricting foreign companies or individuals from owning shares, and in particular, the majority of shares, of domestic daily newspapers? No

Is there any law prohibiting daily newspaper or periodical publishers from operating radio or television stations in the same locality? No

Research

No independent organisation audits circulation. All circulation figures are publishers' claims.

Readership is measured by: Nielsen Media Research

Methodology: Face-to-face interview with 7,500 respondents a year.

So as to guarantee disclosure and transparency in the capital structure and to avert silent partnerships, is there a law or rule making it possible to determine who actually owns a publishing company? No

Is there an antitrust law limiting concentration in the daily press? No

Is further regulation of media concentration expected? No

TAJIKISTAN

General economic situation

GDP total US\$8.476 billion; GDP per capita US\$1,235 (purchasing power parity; 2002). Consumer price index 112 (2001).

Performance of newspapers vs. other media

There is one government-run television network; its several local stations covered regional and local issues from an official point of view. There were 36 non-governmental television stations, not all of which operated at any one time and only a handful of which were genuinely independent. Some of these independent stations had independent studio facilities and broadcast equipment, but most depended on government-owned transmission equipment. In June 2002, four independent television stations' licences were suspended for non-payment of fees for use of government equipment.

A few independent radio stations operate alongside state-run radio. The independent news agency Asia-Plus initiated the first private radio broadcast in the capital city of Dushanbe in September 2002, after the government lifted the ban on independent radio and after a four-year wait for its licence.

Independent radio and television stations continued to experience administrative and legal harassment.

Performance of different types of newspapers

The number of independent and local newspapers continued to increase in 2002. There are 203 newspapers and 56 magazines officially registered. There are no daily newspapers in the country. There are some titles published three times a week. Although only a small number of newspapers attempted to cover serious news, several new newspapers focused on news and analysis. Several newspapers are organs of political parties or blocs.

Circulation

State-run publishing houses often refuse to print independent newspapers with content deemed off-limits by authorities.

Media/press laws

The authorities control the presses and publishing, and obtaining a licence can take several years. Violations of press laws are seen as penal infractions, and libel is punishable by up to two years in prison or five when it involves the head of state.

Sources: CIA – *The World Factbook 2003*; US State Department; Freedom House; Reporters Without Borders; BBC News; WAN from public sources

POPULATION

Population by age and sex

	All individuals		Male		Female	
	000	%	000	%	000	%
0-14	2,729	40	1,376	40	1,353	39
15-64	3,812	56	1,897	56	1,915	56
65+	323	5	141	4	182	5
Total	6,864	100	3,414	100	3,450	100

Source: CIA - *The World Factbook 2003*

TANZANIA

Due to a lack of available data, the majority of charts in this entry have not been updated since the 2003 edition of World Press Trends. Those that have not been updated clearly state the year to which the data relates.

Commentary – *Financial Times*

The performance of newspapers is generally encouraging compared to other media. Electronic media is thinly distributed in a country whose territory measures about 1,000,000 km², although FM radios are rising to dominate the scene, but with scanty advertisement share. Newspaper performance in Tanzania indicates one important trend. Newspapers published in Kiswahili, especially satirical ones, command large readership, though less advertisement volume. Kiswahili is a lingua franca in Tanzania and an official language. Every literate person reads Kiswahili while even illiterates can fluently speak it. There is no English newspaper that commands 15,000 daily direct sales in this country. Almost all-English medium newspapers predominantly depend on advertising income to survive. There are only two Kiswahili-medium evening newspapers whose circulation is around 35,000 daily copies. English readers have acquainted themselves with broadsheets, and Kiswahili readers with tabloids.

Over 95% of sales take place in the capital city Dar es Salaam because of transport and distribution bottlenecks over the sprawling country. All three major publishers are concentrated in Dar es Salaam, including the government. Circulation is generally low during rainy season as vendors have to contend against unfavourable weather. Postal and home delivery systems are extremely underdeveloped. Online publications in Tanzania are almost non-existent because of the lack of territory-wide internet services, though networks are growing.

Advertising culture in Tanzania shows the following general annual trends: corporate and institutional advertisers plan their budgets parallel with government's June/July fiscal plan. Consequently, advertising sales tend to grow gradually from the month of August, stabilise between December-January, rising up again to attain peaks by April.



POPULATION

Population (2002)

	All individuals		Male		Female		Households	
	000	%	000	%	000	%	000	%
Mainland	33,585	97	16,428	97	17,157	97	6,811	97
Zanzibar	985	3	483	3	502	3	185	3
Tanzania	34,569	100	16,910	100	17,659	100	6,996	100

Source: 2002 Population and Housing Census General Report, January 2003

Age structure of readership (2002)

Age	% of readership	% within age group
15-25	25	10
25-45	65	85
45+	10	5

Newspaper reach (% - 2002)

	Daily	Monthly
Men	1.5	6.0

Figures above include non-dailies and Sundays

NUMBER OF TITLES AND CIRCULATION

	2002
Number of titles	
Total dailies	7
National dailies	7
Regional & local dailies	-
Total non-dailies	1
National non-dailies	-
Regional non-dailies	1
Sundays	7
Free papers	6
Circulation (000)	
Total dailies	102
National dailies	102
Regional dailies	-
Total non-dailies	70
National non-dailies	-
Regional & local non-dailies	70
Sundays	20
Free papers	-
Total annual sales (millions of copies)	
Dailies	36.0
Non-dailies	34.4
Sundays	1.6
Free papers	0.5

Free newspapers in Tanzania are only available to subscribers who in turn happen to be the major advertisers.

MORE FACTS

Cover prices (2002)

	Tsh.
Single copy	200-300
Subscription (discount)	15% for a year 10% for 6 mths 5% for 3 mths

Population by

occupational status (2001)

	%
A	63.2
B	1.9
C	0.6
D	4.1
E	1.9
F	6.1
G	8.5
H	6.2
I	2.8
J	4.6
Total	100

Source: Household Budget Surveys by National Bureau of Statistics, 2001

A = Farming, livestock and fishing

B = Employees/govt.

C = Employees/parastatals

D = Employee: others

E = Self-employment with employees

F = Self-employment without employees

G = Unpaid family helper

H = Housewife/house-maker/household

I = Students

J = Inactive



	2002
Sales revenues (Tsh. million)	
Dailies	7,200
Dailies §	7,200
Non-dailies	688
Sundays	320

The figures above do not include VAT
§ at constant 2002 prices

Top ten publishing companies (2002)

(ranked by total circulation)

IPP-Media Limited
Business Times Limited
Habari Corporation Limited
Tanzania Standard Newspapers
Mwananchi Communications Limited
Uhuru Publications Limited
Global Publishers Limited
International Publishing Agency Limited
Sahara Communications Limited
Media Holdings Limited

Top ten advertisers (2002)

Advertiser

Vodacom
Celtel
Coca-Cola
Mobitel
University of Dar es Salaam
Tanzania Telecommunications Company (TTCL)
Population Services International
Standard Chartered Bank
British Airways
Tanzania Breweries Limited

Source: Advertising Departments of three major media houses: Business Times Ltd, IPP-Media and Habari Corporation Ltd.

Top ten advertising categories (2001)

Sector	Display advertising revenues (%)
Telecommunications	21
Food & beverage	16
Pharmaceuticals	14
Office equipment & services	13
Transport	11
Banking & finance	7
Education	6
Tourism & entertainment	5
Corporate & multibrand	4
Household	2

Source: Indicative figures from three major media houses: IPP-Media, Business Times Ltd and Habari Corporation Ltd, February 2003.

Note: Steadman & Associates Ltd, a media monitoring services company is compiling figures covering the period between June 2001 to June 2003.

Top dailies (2002)

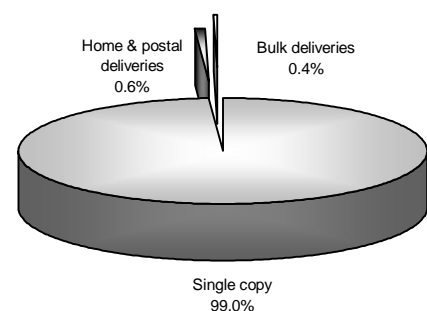
Title	Publisher	Circulation (000)	Readership (000)	Cover Price		Format
				Tsh.	US\$	
Mwananchi	Mwananchi Communication Limited	24	120	150	0.16	Tabloid
Majira	Business Times Limited	23	115	200	0.21	Tabloid
Nipashe	IPP-Media Limited	16	80	200	0.21	Tabloid
Daily News	Tanzania Standard Newspapers	13	65	200	0.21	Broadsheet
Mtanzania	Habari Corporation Limited	12	60	200	0.21	Tabloid
Guardian	IPP-Media Limited	9	45	200	0.21	Broadsheet
The African	Habari Corporation Limited	5	25	200	0.21	Tabloid
Uhuru	Uhuru Publications Limited	3	15	200	0.21	Tabloid

It is estimated that a newspaper copy circulates to about five readers in a day

Type of newspaper sales (%)

	Single copy	Home & postal deliveries	Bulk deliveries
2002	99.0	0.6	0.4

Type of newspaper sales in 2002 (%)





CROSS MEDIA OWNERSHIP

Owners	Regional TV	National TV	Regional Newspapers	National Newspapers	Radio
Regional TV Licensees	Yes	Partial To cover only 25% of territory	Yes	Yes	Partial To cover only 25% of territory
National TV Licensees	Yes, but only state ownership permitted so far	Yes	Yes	Allowed	Allowed
Regional Newspaper Owners	Yes	No	Yes	Yes	Partial
National Newspaper Owners	Yes	Partial	Yes	Yes	Partial
Satellite TV Broadcasters	Yes	Partial	Yes	Yes	Partial
Local Radio Licensees	No	No	Yes	Yes	Patial
National Radio Licensees	Yes License issued to state radio only	Yes	Yes	Yes	Yes
Foreign Investors	Partial	Partial	Yes	Yes	Partial

ADVERTISING EXPENDITURE & ECONOMIC DATA

Main economic indicators 1995-2001

	1995	1996	1997	1998	1999	2000	2001
1 US\$= 966.58 Tsh. at 2002 rate							
Gross Domestic Product (Tsh billion)							
at current prices	3,020	3,768	4,703	5,572	6,433	7,226	8,186
% change	31.4	24.7	24.8	18.5	15.5	12.3	13.3
at 2001 prices	5,748	5,925	6,375	6,694	7,163	7,597	8,186
% change	11.9	3.1	7.6	5.0	7.0	6.1	7.8
Gross Domestic Product per capita (Tsh 000)							
at current prices	106.8	129.5	156.9	166.5	187.6	205.7	227.6
at 2001 prices	203.3	203.7	212.6	200.1	208.9	216.3	227.6
Population							
Millions	28.3	29.1	30.0	33.5	34.3	35.1	36.0
Consumer Price Index							
2001=100	52.5	63.6	73.8	83.2	89.8	95.1	100.0
% change	29.8	21.0	16.0	12.8	7.9	5.9	5.1
Ad.spend as a % of GDP							
	0.00	0.18	0.27	0.40	0.31	-	-
Advertising Expenditure Growth (%)							
at current prices	-	-	87.4	74.4	-10.1	-	-
at 2001 prices	-	-	61.5	54.6	-16.7	-	-

Source: IFS, ZenithOptimedia

Advertising expenditure

(Tsh. millions, in current prices)

	1996	1997	1998	1999
Newspapers	729	841	1,205	1,012
Magazines	0	0	0	6
Television	4,491	8,675	15,938	10,978
Radio	1,531	3,138	4,924	6,984
Cinema	-	-	-	-
Outdoor	-	-	-	851
Total	6,751	12,654	22,067	19,831

Source: ZenithOptimedia



Research

Circulation is audited by: Tanzania has no independent organisation that audits circulation. But law requires publishers to submit their internal audits to the Tanzania Information Services, a government organisation under the Prime Minister's office.

Readership is measured by: Readership measures are done periodically and independently by publishers themselves.

Methodology: Methodologies differ from one house to another depending on whether professional consultants are hired or in-house workers are engaged for the exercise as an extramural assignment.

Taxes

VAT on: sales 0 advertising 20%
 newsprint 20% plant 20%
 composition 20% (standard VAT rate 20%)

Import duties on computers and accessories are zero-rated, down from 20% from 2001 backwards.

Discounts

In order to qualify for postal rate reduction, a newspaper has to be registered with the General Post Office.

Ownership

Does any law exist governing publishing-house ownership, or the

registration of shares in newspaper-publishing companies? The Newspapers Act 1976 regulates the registration of newspaper publishing companies. There are 14 requirements for registration, including business licence and financial ability to publish 10 consecutive issues.

Is there any law prohibiting or restricting foreign companies or individuals from owning shares, and in particular, the majority of shares, of domestic daily newspapers? Foreign ownership not restricted, so long as other laws of the land are adhered to.

Is there any law prohibiting daily newspaper or periodical publishers from operating radio or television stations in the same locality? No

So as to guarantee disclosure and transparency in the capital structure and to avert silent partnerships, is there a law or rule making it possible to determine who actually owns a publishing company? The Newspapers Act (1976) requires the real and true names and places of residence of the persons intended to be proprietor, printer and publisher of the newspaper.

Is there an antitrust law limiting concentration in the daily press? There is no particular anti-trust law placing limits on concentration of newspapers. Only a general competition policy exists and a Fair Trade Practices Act that defines rules and regulations for competition in the economy.

Is further regulation of media concentration expected? No

Due to a lack of available data, the majority of charts in this entry have not been updated since the 2002 edition of World Press Trends. Those that have not been updated clearly state the year to which the data relates.

POPULATION

Population by age and sex (2002)

	All individuals		Male		Female		Households 000
	000	%	000	%	000	%	
0-14	15,769	25	7,987	25	7,782	24	17,120
15-24	11,327	18	5,746	18	5,581	18	
25-34	11,127	18	5,655	18	5,472	17	
35-39	4,994	8	2,494	8	2,500	8	
40-49	8,575	14	4,241	13	4,334	14	
50+	11,648	18	5,483	17	6,165	19	
Total	63,440	100	31,606	100	31,834	100	

Source: AC Nielsen 2002

Newspaper reach (% - 2002)

	Daily
All adults	21.7

Source: AC Nielsen 2002

Population by social class and sex (2002)

	All adults		Male		Female	
	000	%	000	%	000	%
AB	3,334	7	1,936	8	1,398	5
C1	3,099	6	1,600	6	1,499	6
C2	27,605	54	14,888	59	12,717	50
D	2,769	5	1,365	5	1,404	5
E	14,096	28	5,465	22	8,631	34
Total	50,903	100	25,254	100	25,649	100

Source: AC Nielsen 2002

AB = professionals, executives, senior govt officers,
businessmen, merchants, proprietors

C1 = junior government officers

C2 = skilled/semi-skilled craftsmen/tradesmen

D = unskilled workers

E = farmers, fishermen, students, housewives,
unemployed, subsistence

NUMBER OF TITLES AND CIRCULATION

	1997	1998	1999	2000	2001	Change (%)	
						97/2001	2000/01
Number of titles							
Total dailies	44	34	-	-	-	-	-
National dailies	34	25	-	-	-	-	-
Regional dailies	10	9	-	-	-	-	-
Non-dailies	-	-	-	-	-	-	-
Circulation (000) *							
Total dailies	-	11,753	-	-	-	-	-
Non-dailies	-	8,173	-	-	-	-	-
Total annual sales (millions of copies) *							
Dailies	-	3,526	-	-	-	-	-
Non-dailies	-	425	-	-	-	-	-

* estimated

MORE FACTS

Top ten general dailies (2001)

Title	Publisher	Circulation (000)	Readership (000)	Full page rate (Baht)	
				Mono	Colour
Thai Rath	Vacharaphon	1,200	7,635	360,000	600,000
Kom Chat Leuk	-	800	886	288,000	480,000
Daily News	Si-Phya Publishing	750	4,410	288,000	480,000
Khao Sod	Khao Sod Co Ltd	550	951	216,000	324,000
Matichon Daily	Matichon	450	721	216,000	324,000
Naew Nah	Naew Nah Newspaper	250	-	156,000	186,000
Baan Muang	Baan Muang Printing	200	-	120,000	150,000
Siam Rath	-	150	177	168,000	198,000
Thai Post	-	100	-	144,000	174,000
Post Today	-	100	-	144,000	174,000

Source: ZenithOptimedia



						Change (%)	
	1997	1998	1999	2000	2001	97/2000	99/2000
Advertising revenues (Baht million)			*	*			*
All newspapers	8,861	5,852	9,344	12,054	-	-36.03	29.00
All newspapers §	9,972	6,094	9,707	12,328	-	-23.63	27.01

§ at constant 2000 prices

* estimates

Top ten advertising categories (2001)

Sector	Expenditure Baht (000)
Communications	323,664
Auto	198,085
Retail	163,250
Leisure	133,512
Computers	118,294
Property	115,098
Travel & tourism	104,898
Public announcements	102,477
Electrical products	91,863
Audiovisual	85,842

Source: AC Nielsen

Top newspapers by revenue (2000)

Newspaper	Revenue Baht (000s)
Thai Rath	3,258,780
Daily News	1,188,002
Krungthep Turakit	1,006,426
Khao Sod	760,225
Bangkok Post	681,532
Tham Sejakit	662,615
Matichon	553,865
The Nation	505,602
Phujadkarn	425,662
Prachachart Turakij	372,590

Source: AC Nielsen

Top ten advertisers (2001)

Advertiser	Expenditure Baht (000)
Cinema (Western)	133,086
DTAC Mobile Network	120,385
Digital GSM Mobile Network	117,986
AIS Communication Corp.	96,114
UBC	73,076
BMW	72,109
Isuzu	71,212
Telecom Asia Comm. Corp.	68,063
Tesco-Lotus Supercenter	64,797
Samart Info Media Center	61,659

Source: AC Nielsen

ADVERTISING EXPENDITURE & ECONOMIC DATA

Advertising expenditure

(Baht millions, in current prices)

	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
Newspapers	11,433	9,358	6,664	14,172	10,889	16,465	17,583	19,380	21,832	24,622	27,703
Magazines	3,876	3,030	1,603	2,014	2,709	3,111	3,639	4,290	5,263	6,333	7,458
Television	22,962	24,603	21,150	26,041	30,472	32,879	37,340				
Radio	5,400	4,076	3,799	4,112	5,060	5,136	6,170				
Cinema	24	176	223	262	325	370	596				
Outdoor	3,689	4,418	2,042	1,043	1,610	1,999	2,351				
Internet	-	-	-	90	225	150	160				
Total	47,384	45,661	35,480	47,733	51,289	60,110	67,839	76,860	88,845	102,889	119,020

Source: 1996-2002 Media Focus, 2003-2006 ZenithOptimedia

Notes: Excludes agency commission, production costs, includes classified, before discounts

Main economic indicators 1996-2002

	1996	1997	1998	1999	2000	2001	2002
1 US\$= 42.96 Baht at 2002 rate							
Gross Domestic Product (Baht billion)							
at current prices	4,611	4,733	4,626	4,637	4,917	5,123	5,431
% change	10.1	2.6	-2.2	0.2	6.0	4.2	6.0
at 2002 prices	5,483	5,326	4,818	4,817	5,028	5,152	5,431
% change	4.1	-2.9	-9.5	0.0	4.4	2.5	5.4
Gross Domestic Product per capita (Baht 000)							
at current prices	76.9	78.1	75.6	75.3	78.9	81.4	86.3
at 2002 prices	91.4	87.9	78.8	78.3	80.7	81.9	86.3
Population							
Millions	60.0	60.6	61.2	61.6	62.3	62.9	62.9
Consumer Price Index							
2002=100	84.1	88.9	96.0	96.3	97.8	99.4	100.0
% change	5.8	5.7	8.1	0.2	1.6	1.7	0.6
Ad.spend as a % of GDP							
	1.03	0.96	0.77	1.03	1.04	1.17	1.25
Advertising Expenditure Growth (%)							
at current prices	12.2	-3.6	-22.3	34.5	7.4	17.2	12.9
at 2002 prices	6.1	-8.8	-28.1	34.2	5.8	15.2	12.2

Source: IFS, ZenithOptimedia

Research

Circulation is audited by: Audit Bureau of Circulation, Deemar Media Index, AC Nielsen

Readership is measured by: Deemar Media Index, AC Nielsen

Taxes

VAT on: sales 7% advertising 7%
 newsprint 0 (import tax 1.7%)
 plant 0 (import tax 3.0%) composition 0
 (standard VAT rate 7%)

Discounts

on: post 0 rail 0 telephone 0 telegraph 0 telex 0

Ownership

Does any law exist governing publishing-house ownership, or the registration of shares in newspaper-publishing companies? Yes, under Thailand's Constitution.

Is there any law prohibiting or restricting foreign companies or individuals from owning shares, and in particular, the majority of shares, of domestic daily newspapers? Yes, under Thailand's Constitution

Is there any law prohibiting daily newspaper or periodical publishers from operating radio or television stations in the same locality? No

So as to guarantee disclosure and transparency in the capital structure and to avert silent partnerships, is there a law or rule making it possible to determine who actually owns a publishing company? Yes, under Thailand's Constitution.

Is there an antitrust law limiting concentration in the daily press? No

Is further regulation of media concentration expected? No

General economic situation

GDP total US\$7.594 billion; GDP per capita US\$1,399 (purchasing power parity; 2002). Consumer price index 104 (2002).

Performance of newspapers vs. other media

Radio remains the most important medium of mass communication. Two government-owned and 53 private radio stations were officially licensed in December in response to the first government-enacted licensing operation. Two of these, Radio Avenir and Galaxy FM, were associated with the ruling RPT Party. Some private radio stations broadcast domestic news. A private station, Kanal FM, is a foreign affiliate and carries several hours of news, music, and commentary daily.

The government-owned and controlled Television Togo, and the independent TV-2 are the only major television stations in the country. TV-2 carried France-based TV5's international news programming. There are three smaller local television stations, which broadcast religious programming and general entertainment.

Performance of different types of newspapers

More than 15 privately owned newspapers are published regularly. The only daily newspaper, *Togo-Presse*, is government-owned and controlled. There are several independent newspapers that are published on weekly and biweekly schedules.

Newspaper launches/closures

The January 2000 Press Law empowered the Interior Ministry

to seize publications. Police confiscated the print runs of several newspapers in 2002 for publishing "offensive comments" and "undermining the authority of the state." All these seizures were prompted by articles criticizing the government.

Media/Press Laws

In September 2002, the National Assembly passed an amendment to the Press and Communication Code of 1998 that increases the penalty for "defaming or insulting" the president, state institutions, courts, the armed forces, and public administration bodies to a jail term of one to five years.

Codes of Ethics

The Togolese Media Observatory (OTM), a nongovernmental organization, was established to protect press freedom and to improve the professionalism of journalists. OTM's board and membership includes both government and private journalists. During 2003, it met regularly to discuss journalistic ethics and professional standards.

In 2002, Togolese private press publishers association appealed to its members to "be more responsible" and to "show more rigour in the collection, verification, processing and publication of information."

Sources: CIA – *The World Factbook 2003*; Freedom House; US State Department; Reporters Without Frontiers; Committee to Protect Journalists

POPULATION & MORE FACTS

Population by age and sex

	All individuals		Male		Female	
	000	%	000	%	000	%
0-14	2,415	45	1,211	45	1,204	44
15-64	2,878	53	1,405	53	1,473	53
65+	137	3	58	2	79	3
Total	5,430	100	2,674	100	2,756	100

Source: CIA - *The World Factbook 2003*

	2003
Number of titles	
Total dailies	1
<i>National dailies</i>	1

Source: WAN from public sources

Top dailies (2002)

Title	Publisher
Togo-Presse	Government

Source: WAN from public sources

General economic situation

GDP total US\$236 million; GDP per capita US\$2,185 (purchasing power parity; 2002). Consumer price index 108.4 (2001).

Performance of newspapers vs. other media

In 2002 there were two privately owned television stations and one government-owned station. The government-owned radio station broadcast on both AM and FM frequencies. There were three privately owned radio stations.

Performance of different types of newspapers

There are no daily newspapers in Tonga. In 2002, there were eight newspapers and magazines in the country: three weeklies, one of which – *Tonga Chronicle* – was government-owned; three monthlies; one bimonthly; and one quarterly.

Media/press laws

The law allows government officials to bring defamation suits,

as well as suits by officials and other individuals, against media outlets that publish allegedly defamatory remarks. In 2002 government officials filed several defamation suits against the media.

Sources: CIA – *The World Factbook 2003*; US State Department; WAN from public sources

POPULATION

Population by age and sex

	All individuals		Male		Female	
	000	%	000	%	000	%
0-14	41	38	21	39	20	37
15-64	63	58	31	57	32	59
65+	4	4	2	4	2	4
Total	108	100	54	100	54	100

Source: CIA - *The World Factbook 2003*

TRINIDAD & TOBAGO

General economic situation

GDP total US\$11.07 billion; GDP per capita US\$10,027 (purchasing power parity; 2002). Consumer price index 104.3 (2002).

Performance of newspapers vs. other media

Trinidad and Tobago has a lively mixture of public and privately owned media. Many of the latter are owned by large business interests. Privately run TV6, owned by Caribbean Communications Network (CCN), dominates the ratings with its blend of domestically made programmes, including the soap opera Westwood Park, which chronicles the lives of several wealthy Trinidadian families.

Performance of different types of newspapers

All newspapers are privately owned. There are four major

daily newspapers published every day. Trinidad Express – which publishes the *Trinidad and Tobago Express* daily – is a subsidiary of the Caribbean Communications Network.

Media/press laws

Over the past several years the Media Association of Trinidad and Tobago and the Publishers' Association expressed concern about the media's treatment by, and access to, the government.

In 2002, the prime minister signed up to the Inter-American Press Association's declaration on press freedom.

Sources: CIA – *The World Factbook 2003*; BBC News; US State Department; Commonwealth Press Union; WAN from public sources

POPULATION & MORE FACTS

Population by age and sex

	All individuals		Male		Female	
	000	%	000	%	000	%
0-14	244	22	125	22	119	22
15-64	773	70	402	71	371	69
65+	87	8	39	7	48	9
Total	1,104	100	566	100	538	100

Source: CIA – *The World Factbook 2003*

	2002
Number of titles	
Total dailies	4
National dailies	4

Source: WAN from public sources

Top dailies (2002)

Title	Publisher	Circulation (000)	Readership % reach	Format
Newsday	Daily News Ltd.	47	41.0	Tabloid
Trinidad Express	Trinidad Express	45	38.0	-
Trinidad Guardian	Trinidad Publishing Company, Ltd.	45	15.0	Broadsheet
The Wire	-	-	-	Tabloid

Source: WAN from public sources

TUNISIA

General economic situation

GDP total US\$67.13 billion; GDP per capita US\$6,764 (purchasing power parity; 2002). Consumer price index 102.5 (2002).

Performance of newspapers vs. other media

The state maintains a monopoly on radio and television, which provide only official views. However, the public has access to foreign stations through satellite services. The government owns and operates the Tunisian Radio and Television Establishment (ERTT). The ERTT's coverage of government news is taken directly from the official news agency, TAP. There are several government-owned regional radio stations and two national television channels. A bilateral agreement with Italy permits citizens to receive the Italian television station RAI-UNO; since 1999 the broadcast of French television station France 2 has remained suspended because of its critical coverage of the elections. Recent estimates placed the number of satellite dishes in the country at well over 200,000. The government regulates their sale and installation. Many citizens receive two satellite programs broadcast from London by members of the opposition.

Performance of different types of newspapers

There are seven daily newspapers written in either French or Arabic.

Advertising

The government withholds advertising orders from publications that publish articles deemed offensive by the government.

Media/Press Laws

In 2001 the Chamber of Deputies approved several changes to the Press Code, which included the designation of the Ministry of Human Rights, Communications, and Relations with the Chamber of Deputies as the central censorship office. However, with the abolishment of this ministry in September, the role of censor reverted to the Ministry of Interior. The revisions provided that copies of newspapers published outside of Tunis could be deposited with local governors rather than at central Tunis offices.

Newspapers were required to raise the percentage of journalists drawn from the Institute of Journalism (IPSI) on their editorial staff from 30 percent to 50 percent.

The Press Code contains broad provisions prohibiting subversion and defamation, neither of which is defined clearly. The code stipulates fines and confiscation for failure to comply with these provisions. The Government routinely utilize this method to prevent distribution of editions of foreign newspapers and magazines that contain articles critical of the country.



Discussion of corruption and human rights in the media is taboo. Editions of foreign newspapers, including French and pan-Arab publications, are regularly seized.

Sources: CIA – *The World Factbook 2003*; Freedom House; US State Department; BBC News

POPULATION & MORE FACTS

Population by age and sex

	All individuals		Male		Female	
	000	%	000	%	000	%
0-14	2,686	27	1,389	28	1,297	26
15-64	6,607	67	3,307	66	3,300	67
65+	632	6	309	6	323	7
Total	9,925	100	5,005	100	4,920	100

Source: CIA 2003

	2000	2001	2002	Change (%)	
				2000/02	2001/02
Number of titles					
Total dailies	7	7	7	0.00	0.00
Non-dailies	29	-	-	-	-
Circulation (000)					
Total dailies	180	-	-	-	-
Non-dailies	940	-	-	-	-

Source: UNESCO, WAN

Top dailies (2002)

Title	Publisher
La Presse de Tunisie	-
As-Sabah	-
Le Temps	-
L'Action	-
Le Renouveau	Organ of the Democratic Constitutional Gathering
Al Hurriya	Organ of the Democratic Constitutional Gathering
Nouvelles de Tunisie	-

Source: WAN from public sources

POPULATION

Adult population by age and sex

	All adults		Male		Female	
	000	%	000	%	000	%
15	830	50	431	50	399	50
16-24	7,331	28	3,780	28	3,551	28
25-34	6,755	26	3,487	26	3,268	26
35-44	4,703	18	2,427	18	2,276	18
45-54	2,859	11	1,475	11	1,384	11
55-64	1,851	7	949	7	902	7
65+	1,654	6	858	6	796	6
Total	25,983	97	13,407	97	12,576	97

Source: Taylor Nelson-Sofres PIAR

Population by social class and sex

	All adults		Male		Female	
	000	%	000	%	000	%
A+B	4,704	18	2,427	18	2,277	18
C1	6,471	25	3,338	25	3,133	25
C2	4,755	18	2,454	18	2,301	18
D+E	10,047	39	5,183	39	4,864	39
Total	25,977	100	13,402	100	12,575	100

Source: Taylor Nelson-Sofres PIAR

A = higher managerial, administrative, professional

B = intermediate managerial, administrative, professional

C1 = supervisory/clerical/junior managerial

C2 = skilled manual workers

D = semi and unskilled manual workers

E = subsistence/inactive

Age structure of readership

Age	% of readership	% daily reach within age group
under 16	3.7	-
16-24	31.9	80.3
25-34	27.4	74.8
35-44	18.3	71.7
45-54	9.7	62.5
55-64	5.4	54.1
65+	3.6	40.4

Source: Taylor Nelson-Sofres PIAR

Housewives (co-habiting persons)

	Housewives	
	000	%
under 25	1,870	22
25-34	2,689	31
35-44	1,885	22
45-54	1,063	12
55-64	660	8
65+	504	6
Total	8,671	100

Source: Taylor Nelson-Sofres PIAR

Households

Occupancy	Households	
	000	%
1 person	909	3
2 people	3,341	13
3 people	5,295	20
4 people	6,923	27
5 people or more	9,515	37
without children	1,626	6
with children	24,357	94
with children aged 0-4	5,489	21
with children aged 5-11	6,953	27
with children aged 12-17	4,800	18
with children aged 18+	7,115	27
Total	25,983	100

Source: Taylor Nelson-Sofres PIAR

Newspaper reach (%)

	Daily
All adults	69.7
Men	79.8
Women	61.6

Source: Taylor Nelson-Sofres PIAR

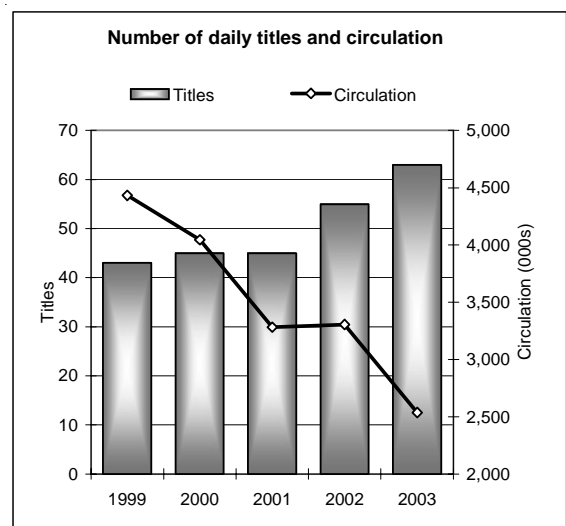
NUMBER OF TITLES AND CIRCULATION

	1999	2000	2001	2002	2003	Change (%)	
						99/2003	2002/03
Number of titles							
Total dailies *	43	45	45	55	63	46.51	14.55
National dailies	32	29	29	33	37	15.63	12.12
Regional dailies	11	16	16	22	26	136.36	18.18
Circulation (000)					**		
Total dailies	4,432	4,047	3,281	3,306	2,538	-42.73	-23.23
National dailies	4,366	3,994	3,212	3,227	2,503	-42.67	-22.44
Regional dailies	65	52	69	78	35	-46.56	-55.36
Total annual sales (millions of copies)					**		
Dailies	1,434	1,309	1,061	1,068	920	-35.84	-13.86

* Figures include only dailies distributed by Yaysat and BBD AŞ.

** Does not include BBD's figures

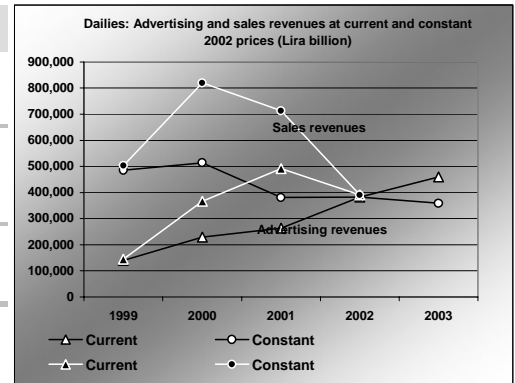
Star magazine is distributed by neither and is not included in the above figures.





MORE FACTS

	1999	2000	2001	2002	2003	Change (%)	
						99/2003	2002/03
Advertising revenues (Turkish Lira billion) **							
Dailies	140,000	229,500	262,900	382,500	459,272	228.05	20.07
Dailies \$	485,421	513,687	381,103	382,500	358,806	-26.08	-6.19
Sales revenues (Turkish Lira billion) ***							
Dailies	145,000	366,230	492,136	390,165	253,522 *	169.1	-20.72
Dailies \$	502,758	819,728	713,406	390,165	198,064 *	-22.4	-45.31
Local dailies	-	-	-	-	2 *		
Volume of display advertising sold (pages)							
Total	36,038	33,904	42,632	45,607	65,365	81.38	43.32
In colour	16,767	21,098	14,631	17,370	36,081	115.19	107.72



Source: Bileşim Adex Research Reports, DYH Advertising Annual Reports, Yaysat A.Ş.

\$ at constant 2002 prices

* Excluding VAT

** Figures include classifieds and inserts

*** Figures include VAT

† figures refer to 99/2002 and 2001/02

2003 data includes dailies which are distributed via two channels, Yaysat and BBD A.Ş.

BBD's figures were not available for 2003 data and are therefore not included here.

Contribution of classified, display and insert advertising to total advertising income (%)

	1999	2000	2001	2002	2003
Display	87	-	92	91	90
Classified	10	-	6	6	7
Inserts	3	-	2	3	3

Distribution and newsprint costs

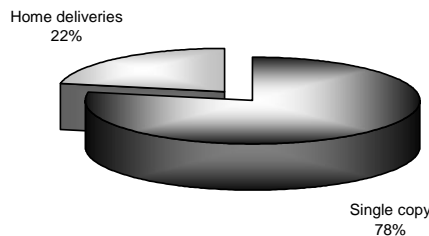
	1999	2000	2001	2002	2003
As % of average cover price					
Single copy sales	15.0	12.5	12.5	13.8	13.8
Average distribution cost per copy					
Single copy (TL) *	26,250	28,125	29,220	11,150	20,178
Newsprint costs (average per ton)					
TL (000)	351,000	-	-	-	-

* Excluding 1% VAT 1999-2002

Type of newspaper sales (%)

	Single copy	Home deliveries
1999	90	10
2000	92	8
2001	90	10
2002	87.2	12.8
2003	78	22

Type of newspaper sales in 2003 (%)



Source: Bilesim Adex Research, Yaysat

Media consumption (minutes per day) *

	2002
Newspapers	30
Magazines	60
Television	180

Source: Taylor Nelson Sofres PIAR, AGB TV Research Company

* average of adults consuming that medium per day

Top ten dailies (2003)

Title	Publisher	Circulation (000)	Readership (000)	Cover Price **		Format	Full page rate (TL Billion)	
				TL	US\$		Mono	Colour
Hürriyet	Hürriyet Gazetecilik ve Matb. AŞ	460	350,000	350,000	0.29	Broadsheet	-	92
Posta	Doğan Gazetecilik AŞ	441	200,000	250,000	0.20	Broadsheet	-	107
Sabah *	Merkez Gazete Dergi Basım Yayın San. Ve Tic. AŞ	400	300,000	350,000	0.29	Broadsheet	95	141
Zaman	Feza Yayıncılık AŞ	311	300,000	300,000	0.24	Broadsheet	89	68
Milliyet	Doğan Gazetecilik AŞ	273	250,000	250,000	0.20	Broadsheet	-	38
Fanatik	Doğan Gazetecilik AŞ	224	200,000	250,000	0.20	Broadsheet	-	86
Vatan	Bağımsız Gazeteciler Yay.	210	250,000	250,000	0.20	Broadsheet	-	91
Tercüman	İlıcak Yayıncılık AŞ	133	150,000	250,000	0.20	Broadsheet	128	164
Gözcü	Hürriyet Gazetecilik ve Matb. AŞ	116	150,000	150,000	0.12	Broadsheet	-	9
Türkiye	İhlas Matbaacılık Gaz.	111	300,000	300,000	0.24	Broadsheet	79	89

* since Sabah is distributed by Merkez Dağıtım, the circulation figure may not be exact

** year-end prices

Top ten advertising categories (2003)

Advertising sector	% of display ad revenue
Auto	14
Finance	11
Publishing	9
Telecommunications	6
Textiles	4
Construction	4
Electronics	3
Beverages	2
Cosmetics	2
Food	1

Source: DYH Advertising Annual Reports

Top publishing companies (2003)

(ranked by total circulation)
Doğan Gazetecilik AS
Hürriyet Gazetecilik ve Matb. AS
Feza Yayıncılık AS
Bağımsız Gazeteciler Yay.
İlıcak Yayıncılık AŞ
İhlas Matbaacılık Gaz.
Vakit Yayın

Source: Yaysat AŞ

Top ten advertisers (2003)

Advertiser	Turkish Lira billion
Turkcell Mobile Com.	11,500
Akbank	10,778
Türkiye İş Bankası	5,638
Renault Mais	5,521
Ford	4,643
HSBC	4,639
Tofaş	4,602
Yapı ve Kredi Bankası	4,328
Dişbank	3,929
Opel Türkiye	3,811

Source: DYH Advertising Annual Reports - estimated figures



Internet publishing (No. of online editions)

	1999	2000	2001	2002	2003
Dailies	16	16	22	24	27

Cover prices

	Lira
Single copy	0.18

Online readership (page impressions per month)

Newspaper website	Publisher	2001	2002	2003
Hürriyetim	Hürriyet Gazetecilik ve Matb.	339,505,473	556,141,692	715,246,219
Milliyet	Doğan Gaz.	341,324,013	566,141,692	780,375,600
Radikal	Doğan Gaz.	19,535,868	22,277,964	22,084,384

Source: Medya-net

Newspaper colour capability & formats

Number of:	1999	2000	2001	2002	2003
4-colour newspapers	43	45	45	55	66
Broadsheets	43	45	45	55	-

ADVERTISING EXPENDITURE & ECONOMIC DATA

Advertising expenditure

(TL billion, in current prices)

	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
Newspapers	22,910	52,765	95,600	140,000	229,500	252,471	388,864	547,907	694,020	918,354	1,182,604
Magazines	2,490	5,735	10,400	25,000	42,300	30,027	21,101	30,868	35,591	51,162	79,429
Television	25,030	60,000	98,500	166,000	284,500	284,459	523,007				
Radio	3,160	8,000	15,000	25,500	47,400	55,029	54,260				
Cinema	1,390	9,500	3,500	5,500	8,200	6,741	9,043				
Outdoor	4,170	10,000	18,000	32,000	56,900	46,940	82,897				
Internet	0	0	0	0	0	1,226	2,261				
Total	59,150	146,000	241,000	394,000	668,800	676,892	1,081,435	1,583,893	2,005,288	2,588,743	3,278,263

Source: 1996-2002 Advertising Agencies Association, 2003-2006 ZenithOptimedia

Notes: Includes agency commission and classified, excludes production costs, after discounts

Main economic indicators 1996-2002

	1996	1997	1998	1999	2000	2001	2002
1 US\$= 625,219 Turkish Lira at 2002 rate							
Gross Domestic Product (TL trillion)							
at current prices	14,772	28,836	52,225	77,415	124,583	178,412	275,479
% change	90.3	95.2	81.1	48.2	60.9	43.2	54.4
at 2002 prices	129,383	135,983	133,384	268,421	278,853	258,628	275,479
% change	53.0	5.1	-1.9	101.2	3.9	-7.3	6.5
Gross Domestic Product per capita (TL million)							
at current prices	240.1	461.7	823.9	1,203.2	1,849.0	2,600.4	4,015.1
at 2002 prices	2,102.8	2,177.1	2,104.2	4,171.9	4,138.5	3,769.5	4,015.1
Population							
Millions	61.5	62.5	63.4	64.3	67.4	68.6	68.6
Consumer Price Index							
2002=100	11.4	21.2	39.2	28.8	44.7	69.0	100.0
%change	80.3	85.7	84.6	64.9	54.9	54.4	45.0
Ad.spend as a % of GDP							
	0.40	0.51	0.46	0.51	0.54	0.38	0.39
Advertising Expenditure Growth (%)							
at current prices	102.6	146.8	65.1	63.5	69.7	1.2	59.8
at 2002 prices	12.3	32.9	-10.6	-0.8	9.6	-34.5	10.2

Source: IFS, ZenithOptimedia

Research

Circulation is audited by: Basın İlan Kurumu
Readership is measured by: BIAK (Taylor Nelson-Sofres PIAR)
Methodology: Daily data collection through face-to-face interviews with a representative sample of 36,000 people in 19 cities each year.

Taxes

VAT on: sales 1% advertising 18%
 composition 0 newsprint 8% plant 0
 (standard VAT rate 18%)

Discounts

on: post 0 rail 0 telephone 0 telegraph 0 telex 0

Ownership

Does any law exist governing publishing-house ownership, or the registration of shares in newspaper-publishing companies? The regulations related to publishing house ownership are Articles 5 and 7 of the Press Law No. 5680. As per these Articles: publishing house owners should be over 21 years old; be literate; have a permanent residence in Turkey; be a Turkish citizen; not be a government officer, a soldier or officer in the army; not be limited or banned from public services; not have been sentenced to heavy imprisonment or to prison for a term longer than five years except for crimes committed by imprudence; or not have been convicted of blackmail, theft, forgery, swindling, breach of trust, perjury, false oath, aspersion, fraudulent bankruptcy, embezzlement, defalcation,



smuggling, bribes, obscene or indecent publication, and several press offences.

In Turkish legislation there is no specific regulation concerning the registration of shares in newspaper-publishing companies.

Is there any law prohibiting or restricting foreign companies or individuals from owning shares, and in particular, the majority of shares, of domestic daily newspapers? There is no law prohibiting foreign companies or individuals from owning shares of a publishing company, provided that this company has been established in Turkey in accordance with Turkish regulation and is therefore considered as a domestic company. However, pursuant to Article 7 of the Press Law No. 5860 as amended by the Law No. 2950, if a foreign natural person (an individual) or legal person (e.g. a company) wishes to directly publish a newspaper in Turkey, it has first to obtain the permission of the Ministry of Internal Affairs to be given upon the advisory opinion of the highest civic authority (majors in towns). The Ministry of Internal Affairs also asks for the opinion of the Ministry of Foreign Affairs.

Is there any law prohibiting daily newspaper or periodical publishers from operating radio or television stations in the same locality? There are some restrictions in Turkish legislation regarding this subject matter. Pursuant to Article 7/6 of the Regulation on the Administrative and Financial Principles, Transmission Area, Transmission Time and Periods of the Private Radio and Television Enterprises, if newspaper owners hold shares in a private radio or television company, the accumulated amount of their shares should not exceed 20% of the paid-in capital of the respective TV or radio company.

So as to guarantee disclosure and transparency in the capital structure and to avert silent partnerships, is there a law or rule making it possible to determine who actually owns a publishing company? As per Article 4 of the Press Law, the owner of the newspaper has to be explicitly shown within the publication. That is, in case the owner is a natural person his name should be indicated, in case the owner is a legal person, e.g. a company, the tradename thereof. Furthermore, pursuant to Article 7, if the newspaper is published by a company or undertaking, the natural person shareholder who owns the majority of the shares should also be indicated. In consequence it is at least possible to determine the natural person shareholder who owns the majority of the shares.

Is there an antitrust law limiting concentration in the daily press? No, there isn't any regulation specifically limiting concentration in the daily press. However, the newspaper publishing companies, just like any other company in Turkey, have to comply with the general provisions of the Protection of Competition Law No. 4054, dated 13.12.1994. To name some examples that are considered as unlawful as per the provisions of the said Law: the misuse of a dominating position; any mergers or acquisitions that establish or strengthen a dominating position and significantly impede the effective competition in the market.

Any merger or acquisition that causes the concentration of a market share of more than 25 % is subject to prior approval of the Turkish Competition Board.

Is further regulation of media concentration expected? No

TURKMENISTAN

General economic situation

GDP total US\$31.34 billion; GDP per capita US\$6,563 (purchasing power parity; 2002). Consumer price index 105 (2002).

Performance of newspapers vs. other media

The oil- and natural gas-rich country has no private media; the government has an absolute monopoly. The authorities monitor media outlets, operate printing presses and lay down editorial policies. The government completely controls radio and local television. In 2002, owners of satellite dishes had access to foreign television programming and the use of satellite dishes throughout the country was widespread. In July 2002, however, the president stopped all satellite and cable services from transmitting, reportedly because of the broadcast on Russian satellite channels of documentary films criticizing government policies. There were reports that satellite-cable television had been restored; however, certain channels can no longer be received.

Performance of different types of newspapers

There are two daily newspapers, both published six times per week: *Neytralniy Turkmenistan* (Russian language), and *Turkmenistan* (Turkmen language).

Foreign newspapers are not easily obtainable. In April 2002, Turkmen officials seized two issues of the Moscow-based daily

Komsomolskaya Pravda containing critical articles about Turkmenistan. In mid-July, authorities began blocking delivery of Russian publications to Turkmen subscribers, officially terminating those subscriptions a month later. In mid-August, the Turkmenistan Communications Ministry announced it had stopped delivering Russian publications to the country.

Media / Press Laws

The government censors newspapers; the Office of the President's Press Secretary's approval is required for prepublication galley.

In order to regulate printing and copying activities, in 1998 the government ordered that all publishing houses and printing and copying establishments obtain a licence and register their equipment. In August 2002, the government imposed a new rule requiring the registration of all photocopiers and that a single individual be responsible for all photocopying activity.

State Support

The government funds almost all print media.

Sources: CIA – *The World Factbook 2003*; US State Department; BBC News; Committee to Protect Journalists

POPULATION & MORE FACTS

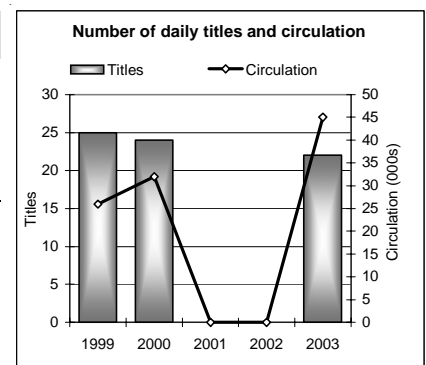
Population by age and sex

	All individuals		Male		Female	
	000	%	000	%	000	%
0-14	1,755	37	900	38	855	35
15-64	2,825	59	1,387	59	1,438	60
65+	195	4	75	3	120	5
Total	4,775	100	2,362	100	2,413	100

Source: CIA - *The World Factbook 2003*

	1999	2000	2001	2002	2003	Change (%)	
						99/2003	2002/03
Number of titles	25	24	-	-	22	-12.00	-
Total dailies	2	2	-	-	2	0.00	-
<i>National dailies</i>					2	-	-
Non-dailies	23	22	-	-	20	-13.00	-
<i>National non-dailies</i>	-	-	-	-	16	-	-
<i>Regional & local non-dailies</i>	-	-	-	-	4	-	-
Circulation (000)					351		
Total dailies	26	32	-	-	45	73.10	-
<i>National dailies</i>	-	-	-	-	45	-	-
<i>Regional & local dailies</i>	-	-	-	-	-	-	-
<i>Free dailies</i>	-	-	-	-	-	-	-
Non-dailies	294	338	-	-	306	4.10	-
<i>National non-dailies</i>	-	-	-	-	249	-	-
<i>Regional & local non-dailies</i>	-	-	-	-	57	-	-

Source: UNESCO, US Embassy in Turkmenistan



Top dailies (2002)

Title	Circulation (000)*
Neytralniy Turkmenistan	23
Turkmenistan	22

Source: US Embassy in Turkmenistan

*estimated

TURKS AND CAICOS ISLANDS

General economic situation

GDP total US\$231 million; GDP per capita US\$11,550 (purchasing power parity; 2000). Consumer price index 104 (1995).

Performance of newspapers vs. other media

BBC World Service and Voice of America can be received. From time to time the frequencies change and the most up-

to-date can be found online.

Performance of different types of newspapers

There are no daily newspapers. The *Turks & Caicos Free Press* and *The Turks and Caicos Weekly News* are published weekly.

Sources: CIA – *The World Factbook 2003*; WAN from public sources

POPULATION & MORE FACTS

Population by age and sex

	All individuals		Male		Female	
	000	%	000	%	000	%
0-14	6	30	3	30	3	30
15-64	12	60	6	60	6	60
65+	2	10	1	10	1	10
Total	20	100	10	100	10	100

Source: CIA - *The World Factbook 2003*

	2002
Number of titles	
Non-dailies	2
<i>National non-dailies</i>	2

Source: WAN from public sources

TUVALU

General economic situation

GDP total US\$12.2 million; GDP per capita US\$1,017 (purchasing power parity; 2000). Consumer price index 105 (2000).

Performance of newspapers vs. other media

In 2001, the country's sole radio station Radio Tuvalu, formerly controlled by government, was sold to a private owner. The sole television station, which was government owned and operated and broadcast from the capital only three hours a week, went off the air in 2001 for financial reasons and has

not resumed broadcasts. Many islanders have satellite dishes for receiving foreign TV.

Performance of different types of newspapers

There are no daily newspapers. The government publishes the fortnightly newspaper *Tuvalu Echoes* in the Tuvalu language (Sikuleo o Tuvalu) and in English.

Sources: CIA – *The World Factbook*; US State Department; BBC News; Freedom House

POPULATION & MORE FACTS

Population by age and sex

	All individuals		Male		Female	
	000	%	000	%	000	%
0-14	4	33	2	33	2	33
15-64	6	50	3	50	3	50
65+	2	17	1	17	1	17
Total	12	100	6	100	6	100

Source: CIA - *The World Factbook 2003*

	2002
Number of titles	
Non-dailies	1
<i>National non-dailies</i>	1

Source: WAN from public sources

Due to a lack of available data, the majority of charts in this entry have not been updated since the 2002 edition of World Press Trends. Those that have not been updated clearly state the year to which the data relates.

POPULATION

Population by age and sex (2001)

	All individuals		Male		Female		Households 000
	000	%	000	%	000	%	
Children	10,058	47	5,031	48	5,027	46	4,200
15-24	4,237	20	1,996	19	2,241	21	
25-34	2,825	13	1,350	13	1,475	14	
35-44	1,562	7	756	7	806	7	
45-54	1,134	5	552	5	582	5	
55-64	706	3	349	3	357	3	
65+	728	3	365	4	363	3	
Total	21,250	100	10,399	100	10,851	100	

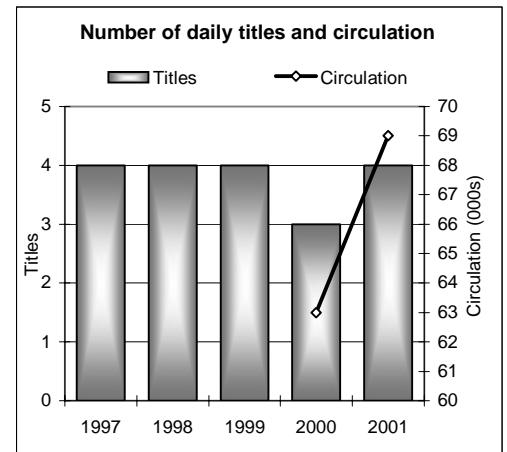
Source: Population Secretariat Projections 2001, Uganda National Household Survey 1999/2000

Newspaper reach 2001 (%)

	Daily	Weekly
All adults	8.0	15.2

NUMBER OF TITLES AND CIRCULATION

	1997	1998	1999	2000	2001	Change (%)	
						97/2001	2000/01
Number of titles							
Total dailies	4	4	4	3	4	0.00	33.33
National dailies	3	3	3	3	4	33.33	33.33
Local dailies	1	1	1	-	-	-	-
Non-dailies	15	16	16	9	6	-60.00	-33.33
National non-dailies	9	10	9	8	5	-44.44	-37.50
Regional non-dailies	1	1	1	1	1	0.00	0.00
Local non-dailies	5	5	6	-	-	-	-
Sundays	2	2	2	-	-	-	-
Free papers	1	1	2	2	2	100.00	0.00
Circulation (000)							
Dailies	-	-	-	63	69	-	9.52
Sundays	-	-	-	50	77	-	54.00
Total annual sales (millions of copies)							
Dailies	-	-	-	22.3	24.6	-	10.31
Sundays	-	-	-	2.6	4.0	-	53.85



MORE FACTS

	1997	1998	1999	2000	2001	Change (%)	
						97/2001	2000/01
Sales revenues (Shilling million)							
Dailies	-	-	-	15,600	17,200	-	10.26
Sundays	-	-	-	1,800	2,800	-	55.56

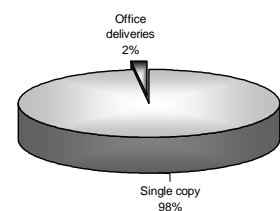
Type of newspaper sales (%)

	Single copy	Office deliveries
1997	98	2
1998	98	2
1999	98	2
2000	98	2
2001	98	2

Newsprint costs (average per ton)

	1997	1998	1999	2000	2001
Newsprint costs (average per ton)					
Ugandan Shilling	1,280,400	1,412,820	1,334,524	1,404,760	1,590,750
US\$	776	846	792	812	908

Type of newspaper sales in 2001 (%)



Top dailies (2001)

Title	Publisher	Circulation (000)	Cover Price		Format
			Shilling	US\$	
The New Vision	New Vision Printing & Pub. Corp.	33	700	0.39	Tabloid
The Monitor	Monitor Publishers	18	700	0.39	Tabloid
Bukedde	New Vision Printing & Pub. Corp.	15	600	0.33	Tabloid
Ngoma	Monitor Publishers	3	600	0.33	Tabloid

**Top ten advertisers (2001)**

Advertiser	Newspaper expenditure Shilling (mill)
MTN	2,000
UTL	1,200
Makerere University	400
Uganda Electricity Board (UEB)	302
Celetel	300
Ministry of Education	103
Uganda Breweries	101
Ministry of Health	90
Uganda Revenue Authority (URA)	80
Shell	70

Source: *New Vision*

Cover prices (2002)

	Shilling
Single copy	600-700

ADVERTISING EXPENDITURE & ECONOMIC DATA**Main economic indicators 1996-2002**

	1996	1997	1998	1999	2000	2001	2002
1 US\$= 1,797.60 Shilling at 2002 rate							
Gross Domestic Product (Shilling billion)							
at current prices	6,637	-	-	-	-	-	-
% change	11.0	-	-	-	-	-	-
at 2002 prices	7,763	-	-	-	-	-	-
% change	3.6	-	-	-	-	-	-
Gross Domestic Product per capita (Shilling 000)							
at current prices	334.3	-	-	-	-	-	-
at 2002 prices	391.1	-	-	-	-	-	-
Population							
Millions	19.9	20.4	21.0	21.6	22.2	22.8	22.8
Consumer Price Index							
2002=100	84.1	89.9	89.9	95.3	98.4	100.3	100.0
% change	7.2	6.9	0.0	6.1	3.2	2.0	-0.3

Source: *IFS, ZenithOptimedia*

Taxes

VAT on:	sales 17%	advertising 17%
	newsprint 17%	plant 17%
	composition 17%	(standard VAT rate 17%)

There are no specific tax concessions for newspaper companies.

Discounts

on: post 0 rail 0 telephone 0 telegraph 0 telex 0

Ownership

Does any law exist governing publishing-house ownership, or the registration of shares in newspaper-publishing companies? Yes -

the Press and Journalist Statute.

Is there any law prohibiting or restricting foreign companies or individuals from owning shares, and in particular, the majority of shares, of daily newspapers? No

So as to guarantee disclosure and transparency in the capital structure and to avert silent partnerships, is there a law or rule making it possible to determine who actually owns a publishing company? No

Is there an antitrust law limiting concentration in the daily press? No

Is further regulation of media concentration expected? No

POPULATION

Urban population by age and sex

	All individuals		Male		Female	
	000	%	000	%	000	%
12-15	1,295	8	658	8	637	7
16-19	1,447	8	719	9	727	8
20-29	3,485	20	1,762	22	1,723	19
30-39	3,345	19	1,629	20	1,716	19
40-54	4,967	29	2,266	28	2,701	30
55-65	2,656	15	1,147	14	1,510	17
Total	17,196	100	8,181	100	9,014	100

Source: Taylor Nelson Sofres

Households

	Adults	
	000	%
1 person	1,046	6
2 people	3,417	20
3 people	6,213	36
4 people	4,556	26
5 people	1,378	8
6 or more people	560	3
Unknown	26	0
without children	11,829	69
with children	5,367	31
with children aged 7-11	2,349	14
with children aged 4-6	1,235	7
with children aged 2-3	1,006	6
with children 1 year old	426	2
with children under 1 year	351	2
Total	17,196	100

Source: Taylor Nelson Sofres

Housewives (co-habiting persons)

	Housewives	
	000	%
16-19	31	3
20-29	451	43
30-39	326	31
40-54	232	22
55-65	9	0.8
Total	1,048	100

Source: Taylor Nelson Sofres

Adult population by financial status

	Adults		Male		Female	
	000	%	000	%	000	%
Prosperous	428	2	235	3	193	2
Well-to-do	4,608	27	2,283	28	2,325	26
Moderate income	7,031	41	3,338	41	3,693	41
Poor	3,221	19	1,370	17	1,851	21
No answer	1,907	11	955	12	952	11
Total	17,196	100	8,181	100	9,014	100

Source: Taylor Nelson Sofres

Age structure of readership (2002)

Age	% of readership	% daily reach within age group
	16-24	18
25-34	22	47.5
35-44	21	51.9
45-54	17	44.3
55-65	21	31.2

Source: Publicitas Ukraine

NUMBER OF TITLES AND CIRCULATION

	1998	1999	2000*	2001*	Change (%)	
					98/2001	2000/01
Number of titles						
Total dailies	32	38	-	-	-	-
National dailies	12	12	-	-	-	-
Regional dailies	18	24	-	-	-	-
Local dailies	2	2	-	-	-	-
Non-dailies	790	1,106	-	-	-	-
National non-dailies	70	74	-	-	-	-
Regional non-dailies	391	677	-	-	-	-
Local non-dailies	329	355	-	-	-	-
Free papers	40	52	-	-	-	-
Circulation (000)						
Total dailies[^]	2,115	4,322	-	-	-	-
National dailies	1,321	3,449	-	-	-	-
Regional dailies	779	859	-	-	-	-
Local dailies	14	14	-	-	-	-
Non-dailies	16,051	20,620	-	-	-	-
National non-dailies	3,045	2,916	-	-	-	-
Regional non-dailies	11,065	15,503	-	-	-	-
Local non-dailies	1,941	2,201	-	-	-	-
Free papers	4,272	3,838	-	-	-	-

Source: Publicitas Ukraine

There are no Sunday newspapers in Ukraine

* No figures have been released since 1999, but estimates suggest the total number of registered titles now exceeds 3,000.

[^]The sharp rise in the circulation of national dailies in 1999 was due to one newspaper

- Fakty i Kommentarii - which in October enjoyed a brief surge in circulation to 1.1 million. By the end of the year, circulation was back down to 220,000, though.

Newspaper reach (%)

	Daily *
	Males
Females	51.6

Source: Taylor Nelson Sofres Ukraine

* The readership of daily publications over the second half of 2002



MORE FACTS

	1999	2000	2001	2002	2003	Change (%)	
						99/2003	2002/03
Advertising revenues (US\$ million)							
All newspapers	38.7	23.0	-	42.2	67.1	73.4	59.2
Dailies	-	-	-	37.7	12.8	-	-66.1
Paid-for non-dailies	-	-	-	4.4	50.6	-	1038.9
Free non-dailies	-	-	-	-	3.7	-	-

Source: MMI Ukraine, Consulting Ukraine. Includes classifieds and inserts, production costs, and agency commission. Before discounts (15-20%), typical discounts are 10-20%.

2000 figure includes only national titles with the highest circulation.

Newspaper colour capability & formats

Number of:	1998	1999
4-colour newspapers	2	5
Broadsheets	18	22
Tabloids	14	16
Total	32	38

Source: Publicitas Ukraine

Contribution of classified and display advertising to total advertising income (%)

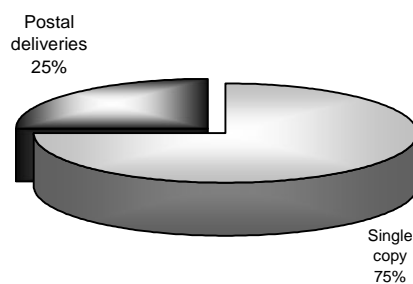
	1999	2000	2001	2002	2003
Display	65	-	-	65	71.4
Classified	25	-	-	-	21.0
Inserts	10	-	-	-	-
PR articles	-	-	-	-	7.7

Source: Consulting Ukraine, Monitoring of Ukrainian Media

Type of newspaper sales (%)

	Single copy	Postal deliveries
2001	75	25

Type of newspaper sales in 2001 (%)



Distribution and newsprint costs

	2000	2001
As % of average cover price		
Single copy sales	-	15-40
Postal deliveries	-	40
Average distribution cost per copy		
Subscription	Hryvnia	-
	Euro	0.84
Single copy	Hryvnia	-
	Euro	0.13
Newsprint costs (average per ton)		
Hryvnia	3,300	2,950
Euro	609	641

Top ten advertising categories (2003)

Advertising sector	% of newspaper advertising
Mass media	17.3
Auto	9.4
Communications	7.7
Finance	5.6
Entertainment	5.2
Education and jobs	4.8
Computers	4.3
Construction and repairs	3.7
Medicines	3.5
Decorating materials	3.4

Source: Monitoring of Ukrainian Media

Top ten publishing companies (2003)

	Advertising revenue US\$
ZAT Blitz-Inform	13,385,256
AT Ukrainian Media Holding	12,622,881
ZAT Kartel	5,482,372
AT Galytski Kontrakty	4,079,888
KP-Druk Ltd.	3,791,781
AT Fakty I Kommentarii	3,069,413
Auto Photo Prodazha Information and Publishing Center Ltd.	2,743,258
KIRTS Sens	2,391,357
TV Park	1,567,762
AT Vysoky Zamok	1,392,541

Source: Monitoring of Ukrainian Media

Top ten newspaper advertisers (2003)

Advertiser	Newspaper advertising US\$
Blitz-Inform	3,286,133
KyivStar GSM	1,673,667
Studio 1+1	1,478,536
UMC	1,468,524
Samsung Electronics	1,046,595
Druk Ltd.	1,037,668
Inter	952,115
Ukrainian Media Holding	714,223
Kartel Ltd.	659,421
Autoinveststroj	523,063

Source: Monitoring of Ukrainian Media



Top ten dailies (2002)

Title	Publisher	Circulation * (000)	Format **	Full page rate (US\$)		
				Mono	BDM ***	Colour
Golos Ukrainy (Kiev)	Parliament of Ukraine	170	Tabloid	1,300	1,300	-
Fakty i Kommentarii (Kiev)	AT Editorial Office of Fakty i Kommentarii	165	Tabloid	8,640	14,400	-
Komsomolskaya Pravda in Ukraine (Ukraine)	AT Ukrainian Media Holding	161	Broadsheet/tabloid	2,000	6,000	-
Kievskie Vedomosti (Kiev)	ZAO Kievskie Vedomosti	138	Tabloid	3,000	4,500	-
Uryadovy Kurier (Kiev)	Cabinet of Ministers of Ukraine	133	Tabloid	1,522	1,522	-
Vechernie Vesti (Kiev)	AT Editorial Office of Vechernie Vesti	125	Tabloid	2,000	3,000	-
Segodnia (Kiev)	AT Editorial Office of Segodnia	111	Tabloid	3,840	4,768	-
Vysokyi Zamok (Lvov)	AT Vysokyi Zamok	93	Tabloid/broadsheet	1,000	5,000	10,000
Dnepr Vechernii (Dnepropetrovsk)	AT Editorial Office of Dnepr Vechernii	70	Broadsheet	1,818	3,636	-
Den (Kiev)	AT Editorial Office of Den	62	Broadsheet/tabloid	3,500	2,000	-

Source: Publicitas Ukraine

* Daily average circulation. Many newspapers have different circulation depending on the weekday.

** When Tabloid/broadsheet is indicated it means that the paper has different format depending on the weekday.

*** BDM = The best day means the day when the circulation is biggest (usually Friday).

ADVERTISING EXPENDITURE & ECONOMIC DATA

Main economic indicators 1993-1999

	1993	1994	1995	1996	1997	1998	1999
1 US\$=	5.33	Hryvnia at 1999 rate					
Gross Domestic Product (Hryvnia billion)							
at current prices	1	12	55	82	93	103	127
% change	-	23,836.4	352.8	49.5	14.6	9.8	23.9
at 1999 prices	199	163	155	128	127	126	127
% change	-	-18.1	-5.0	-17.1	-1.1	-0.7	1.0
Gross Domestic Product per capita (Hryvnia 000)							
at current prices	0.0	0.2	1.1	1.6	1.8	2.0	2.5
at 1999 prices	3.8	3.1	3.0	2.5	2.5	2.5	2.5
Population							
Millions	52.2	52.1	51.7	51.3	50.9	50.5	50.1
Consumer Price Index							
1999=100	0.7	7.4	35.3	63.6	73.7	81.5	100.0
% change	4,734.9	891.2	376.7	80.3	15.9	10.6	22.7
Ad.spend as a % of GDP							
	-	-	-	0.16	0.32	0.64	0.90
Advertising Expenditure Growth (%)							
at current prices	-	-	-	-	127.9	120.9	75.4
at 1999 prices	-	-	-	-	96.6	99.8	43.0

Source: IFS, ZenithOptimedia

Advertising expenditure

(US\$ million, in current prices)

	1996	1997	1998	1999	2000	2001	2002	2003
Newspapers	25.0	23.8	24.0	38.7	44	70	95	67
Magazines	11.0	12.2	13.0	17.3	-	-	-	64
Television	27.0	91.0	171.0	161.5	209	400	636	1,115
Radio	2.0	5.0	8.0	18.0	-	26	34	33
Other	6.0	27.0	51.0	42.3	47	63	81	109
Total	71.0	159.0	267.0	277.8	300	559	846	1,388

Source: MMI Ukraine, Consulting Ukraine, Monitoring of Ukrainian Media

Notes: Before discounts, excludes classified, production costs and agency commission
Newspapers' includes magazine for 2000-2002

POPULATION & MORE FACTS

Population by age and sex

	All individuals		Male		Female		Households 000
	000	%	000	%	000	%	
0-14	677	28	345	24	332	34	384
15-64	1,704	70	1,069	73	635	64	
65+	65	3	46	3	19	2	
Total	2,446	100	1,460	100	986	100	

Source: CIA

Top newspapers (2002)

Title	Circulation (000)	Adult readership (000)	Full page rate (US\$)	
			Mono	Colour
Gulf News	86	297	6,815	13,630
Al Khaleej	85	474	5,332	7,464
Al Ittihad	76	314	5,185	6,815
Khaleej Times	71	227	6,452	8,286
Al Bayan	69	154	5,185	7,259
Gulf Today	36	126	4,739	5,554

Source: ZenithOptimedia

Top ten advertising categories (2001)

Advertising sector	Newspaper expenditure US\$ (000)
Retail	33,163
Auto	14,640
Office equipment	13,093
Finance	12,260
Entertainment	9,207
Publishing/media	8,987
Services	8,691
Community	6,140
Jewellery	5,218
Cosmetics	4,063

Source: SPC

Top ten advertisers (2001)

Advertiser	Newspaper expenditure US\$ (000)
Nokia	2,686
Toyota	1,540
Emirates Airline	1,242
Compaq	1,080
Samsung	966
Mitsubishi	955
Nissan	920
Hyundai	753
Dubai Summer Sr.	687
LG	647

Source: SPC

NUMBER OF TITLES AND CIRCULATION

Main economic indicators 1996-2002

	1996	1997	1998	1999	2000	2001	2002
1 US\$=	3.67						
	Dirhams at 2002 rate						
Gross Domestic Product (Dirhams billion)							
at current prices	164	181	171	-	-	-	-
% change	11.4	10.6	-5.8	-	-	-	-
Gross Domestic Product per capita (Dirhams 000)							
at current prices	67.1	69.2	61.4	-	-	-	-
Population							
Millions	2.4	2.6	2.8	2.9	2.6	2.7	-
Ad.spend as a % of GDP							
	0.42	0.40	0.42	-	-	-	-
Advertising Expenditure Growth (%)							
at current prices	26.1	4.7	-1.4	1.1	9.5	22.8	33.9

Source: IFS, ZenithOptimedia

Advertising expenditure

(Dirhams million, in current prices)

	1996	1997	1998	1999	2000	2001	2002
Newspapers	385	408	392	386	462	602	815
Magazines	109	128	126	122	121	154	203
Television	148	128	119	129	97	101	117
Radio	16	17	34	43	71	73	68
Outdoor/other	29	37	39	38	35	36	91
Total	687	719	709	717	786	965	1,293

Source: 1996-2002 PARC

Notes: Includes agency commission, excludes classified advertising and production costs. Before discounts.

Commentary (on regional press) - The Newspaper Society

"Mintel believes that the regional newspaper industry is in a strong position to maintain and grow profitability over the longer term, although continuing to face challenging conditions alongside all others in print media". Though it faces ever-growing competition from other media, the regional press is still read by the majority of the population (85%), and readership and advertising revenue continue to grow.

The regional press has shown resilience over the last few years, while the advertising market as a whole has experienced very difficult times. Regional press advertising grew by 3.2% in 2003 to £2.986 billion, outperforming total UK adspend, which grew by 2.5%. This follows a decade of consecutive years of growth in regional press adspend.

In 2003 the regional press also experienced the fastest growth in online recruitment advertising; online recruitment in the regional press grew 48.2% to £24 million, and accounted for 30% of the total online recruitment market. This excludes revenues from Fish4jobs, the job site owned by regional press.

The regional press industry believes it has further potential for growth. This optimism is justified by an independent piece of research into advertising effectiveness named the Conversion Study. The research tracked 26 brands over nine months and found that local press advertising plays a crucial role in pushing consumers along the buying process towards purchase. The study concluded that nine out of 10 campaigns in regional press work, and that on average, awareness of local press advertising for the brands on the study increased by 10 percentage points. The Conversion Study has been well received by national advertisers as proof of the effectiveness of the regional press.

Regional identity remains as important as ever. This has

been demonstrated by a piece of research produced by the Future Foundation, entitled MYUK. The report found that the vast majority (86%) of people feel an attachment to their local neighbourhood, city, town or village, with more people spending time out and about in their local area. Regional press was found to play an important role in people's sense of community, with 65% of people believing that local newspapers make the most important contribution to regional identity.

MYUK followed "Renaissance of Regional Nations", an earlier piece of research carried out by the Future Foundation. The report discovered that almost every major element of a person's life is carried out within a 14-mile radius of home, so a sense of community and locality in the UK is very strong.

Circulation and distribution

85% of British adults (40 million) read a regional press title.

Some 3,870 local newspapers are sold in the UK every minute; 39 million regional newspapers are sold and 24 million freely distributed every week. In terms of circulation, the weeklies, which comprise 80% of all regional titles in ABC, are outperforming the market. The regional press has been actively reducing bulks and discounted copies; three-quarters of regional newspapers now post 100% actively purchased figures.

Top publishers

On 1 January 2004 there were 96 regional press publishers; the largest 20 accounted for 85% of all titles and 96% of the total weekly circulation and distribution. Trinity Mirror remains the largest publisher by weekly circulation, although Johnston Press owns the more titles than any other regional press publisher. Nearly half of all publishers (47) own just one title.

POPULATION

Population by age and sex

	All adults		Male		Female		Households 000
	000	%	000	%	000	%	
15-24	7,216	15	3,686	16	3,530	15	25,655
25-34	7,966	17	4,041	18	3,925	16	
35-44	9,003	19	4,549	20	4,454	18	
45-54	7,494	16	3,736	16	3,758	16	
55-64	6,430	14	3,170	14	3,260	13	
65+	9,145	19	3,853	17	5,292	22	
Total	47,254	100	23,035	100	24,219	100	

Source: BMRB/TGI 2003 March 2002-April 2003

Age structure of regional daily press readership

Age	% of readership	% daily reach within age group
15-24	16.6	35.7
25-34	16.7	32.4
35-44	18.2	31.3
45-54	16.0	33.1
55-64	13.9	33.4
65+	18.6	31.5

Source: BMRB/TGI 2003 March 2002-April 2003

Population by social class and sex

	All adults		Male		Female	
	000	%	000	%	000	%
AB	11,065	24	6,217	27	5,577	23
C1	12,981	28	6,071	26	7,284	30
C2	9,784	21	5,341	23	4,490	19
D	8,321	18	3,786	16	4,106	17
E	4,814	10	1,619	7	2,762	11
Total	46,965	100	23,034	100	24,219	100

Source: BMRB/TGI 2003 March 2002-April 2003

A= higher managerial, administrative, professional

B= intermediate managerial, administrative, professional

C1= supervisory, clerical, junior managerial

C2= skilled manual workers

D= semi and unskilled manual workers

E= subsistence, state pensioners, widows, inactive

Newspaper reach (%)

	Regional dailies daily reach
All adults	32.8
Men	34.9
Women	30.7
MHS	30.7

Source: BMRB/TGI 2003 March 2002-April 2003

MHS = Main Household Shopper



Households

Occupancy	Households	
	000	%
1 person	7,420	29
2 people	8,656	34
3 people	3,990	16
4 people	3,855	15
5 or more people	1,734	7
without children	17,659	69
with children	7,995	31
with children aged 1-4	3,094	12
with children aged 5-9	3,584	14
with children aged 10-15	3,986	16
Total	25,654	100

Source: BMRB/TGI 2003 March 2002-April 2003

Housewives (co-habiting persons)

	Housewives	
	000	%
Under 25	1,560	8
25-34	3,207	16
35-44	3,963	20
45-54	3,328	17
55-64	2,792	14
65+	4,604	24
Total	19,454	100

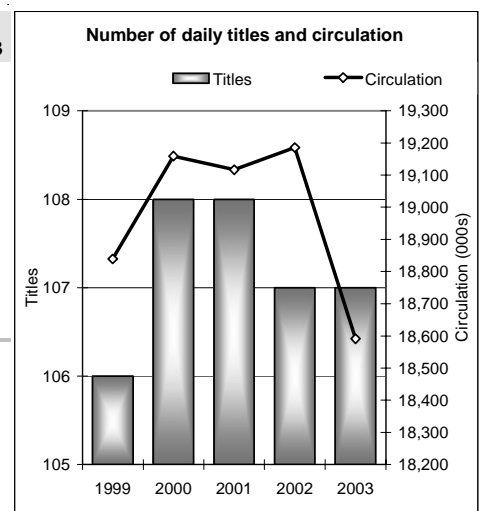
Source: BMRB/TGI 2003 March 2002-April 2003

NUMBER OF TITLES AND CIRCULATION

	1999	2000	2001	2002	2003	Change (%)	
						99/2003	2002/03
Number of titles							
Total dailies	106	108	108	107	107	0.94	0.00
National dailies	10	10	10	10	10	0.00	0.00
Regional & local dailies	91	92	92	91	91	0.00	0.00
Free dailies	5	6	6	6	6	20.00	0.00
Total non-dailies	1,059	1,031	952	1,030	1,057	-0.19	2.62
Regional & local non-dailies	466	467	435	480	483	3.65	0.63
Free non-dailies	593	564	517	550	574	-3.20	4.36
Total Sundays	18	21	21	21	22	22.22	4.76
National Sundays	11	11	11	11	11	0.00	0.00
Regional & local Sundays	7	10	10	10	11	57.14	10.00
Circulation (000)							
Total dailies	18,839	19,159	19,117	19,186	18,591	-1.32	-3.10
National dailies	13,228	12,928	12,944	12,816	12,418	-6.12	-3.11
Regional & local dailies	5,374	5,681	5,353	5,533	5,309	-1.21	-4.05
Free dailies	237	550	820	837	864	264.56	3.23
Total non-dailies	33,024	34,379	31,965	31,712	28,175	-14.68	-11.15
Regional & local non-dailies	6,224	6,246	6,313	6,470	6,334	1.77	-2.10
Free non-dailies	26,800	28,133	25,652	25,242	21,841	-18.50	-13.47
Total Sundays	16,193	15,696	15,503	15,192	14,731	-9.03	-3.03
National Sundays	14,088	13,688	13,660	13,428	13,011	-7.64	-3.11
Regional & local Sundays	2,105	2,008	1,843	1,764	1,720	-18.29	-2.49
Total annual sales (millions of copies)							
Total dailies	5,824	5,822	5,784	5,716	5,622	-3.47	-1.64
National dailies	4,101	4,008	4,013	3,973	3,850	-6.12	-3.10
Regional & local dailies	1,666	1,682	1,574	1,542	1,565	-6.06	1.49
Free dailies	57	132	197	201	207	263.16	2.99
Total non-dailies	1,728	1,751	1,666	1,625	1,437	-16.84	-11.57
Regional & local non-dailies	324	321	321	328	323	-0.31	-1.52
Free non-dailies	1,404	1,430	1,345	1,297	1,114	-20.66	-14.11
Total Sundays	809	784	775	759	737	-8.90	-2.90
National Sundays	704	684	683	671	651	-7.53	-2.98
Regional & local Sundays	105	100	92	88	86	-18.10	-2.27

Source: Newspaper Society, ABC/VFD, Advertising Association

* ZenithOptimedia estimate



MORE FACTS

Top ten regional dailies (2003)

Title	Publisher	Circulation (000)	Readership (000)	Cover Price		Format	Full page rate (£)	
				£	US\$		Mono	Colour
Daily Record (Scotland) *	Trinity Mirror	514	1449	0.30	0.45	Tabloid	9,600	-
Evening Standard (London) *	Associated Newspapers	419	925	0.40	0.60	Tabloid	11,000	15,000
Express & Star (Midlands)	The Midlands News Association	168	476	0.30	0.45	Tabloid	7,380	-
Manchester Evening News	Guardian Media Group	158	404	0.30	0.45	Tabloid	7,570	-
Liverpool Echo	Trinity Mirror	143	388	0.32	0.48	Tabloid	6,970	8,407
Birmingham Evening Mail	Trinity Mirror	114	393	0.32	0.48	Tabloid	8,353	11,732
Belfast Telegraph	Independent News & Media	109	-	0.50	0.75	Broadsheet	9,349	-
Leicester Mercury	Northcliffe Newspapers	99	238	0.28	0.42	Tabloid	3,859	5,862
Newcastle Evening Chronicle	Trinity Mirror	97	274	0.30	0.45	Tabloid	4,454	-
Glasgow Evening Times	Newsquest (Media Group)	96	298	0.30	0.45	Tabloid	6,500	-

Source: BRAD, JICREG (Nov 03), ABC (Jan-Jun 2003), NS database (Jan 04), NRS

* These papers are often considered nationals for media buying purposes



Top ten national dailies (2003)

Title	Publisher	Circulation (000) *	Readership (000)	Cover Price		Format	Full page rate (£)	
				£	US\$		Mono	Colour
The Sun	News International	3,298	8,824	0.30	0.45	Tabloid	38,989	48,090
The Daily Mail	Associated Newspapers	2,316	5,784	0.40	0.60	Tabloid	31,500	45,612
Daily Mirror	Trinity Mirror	1,549	4,785	0.35	0.53	Tabloid	29,000	36,800
Daily Express	Express Newspapers	911	1,257	0.40	0.60	Broadsheet	20,825	31,500
The Daily Telegraph	Telegraph Group	895	1,906	0.60	0.90	Tabloid	44,000	55,550
Daily Star	Express Newspapers	890	1,777	0.35	0.53	Broadsheet	9,419	15,925
The Times	News International	635	1,729	0.50	0.75	Tabloid	24,200	36,000
The Guardian	Guardian Newspapers	341	1,272	0.55	0.83	Tabloid	17,000	20,000
The Independent	Independent Newspapers	226	569	0.60	0.90	Broadsheet	15,000	22,000
Financial Times	Financial Times	143	465	1.00	1.50	Broadsheet	38,760	61,200

Source: ABC, NRS

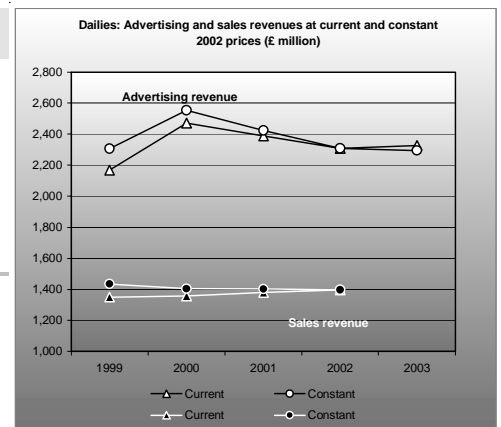
* circulation in the UK and Republic of Ireland only

	1999	2000	2001	2002	2003	Change (%)	
						99/2002	2001/02
Advertising revenues (£ million)							
Total dailies	2,168	2,472	2,388	2,310	2,327 *	6.55	-3.27
National dailies	1,145	1,335	1,242	1,163	-	1.57	-6.36
Regional dailies & Sundays	1,023	1,137	1,146	1,147	-	12.12	0.09
Dailies §	2,305	2,554	2,423	2,310	2,295 *	0.20	-4.66
Non-dailies	1,391	1,549	1,610	1,644	-	18.19	2.11
Regional & local non-dailies	470	519	546	568	-	20.85	4.03
Free non-dailies	921	1,030	1,064	1,076	-	16.83	1.13
National Sundays	546	579	519	478	-	-12.45	-7.90
Sales revenues (£ million)							
Total dailies	1,350	1,358	1,381	1,398	-	3.56	1.23
National dailies	942	940	989	1,007	-	6.90	1.82
Regional dailies & Sundays	408	418	392	391	-	-4.17	-0.26
Dailies §	1,436	1,403	1,401	1,398	-	-2.61	-0.23
Regional & local non-dailies	83	89	90	95	-	14.46	5.56
National Sundays	337	348	359	376	-	11.57	4.74
Pages of advertising sold (national and regional, display only)							
Mono	58,620	54,419	-	-	-	-	-
Colour	46,975	48,618	-	-	-	-	-

Source: Advertising Association, AC Nielsen MMS, World Advertising Research Centre
§ at constant 2002 prices

* WAN/ZenithOptimedia estimate

Figures include classifieds, inserts and agency commission, but not production costs



Contribution of classified and display advertising to total advertising income in regional dailies (%)

	2002
Display	32.8
Classified	67.2

Source: Advertising Association

National newspapers internet publishing

(No. of online editions)

	1999	2000	2001	2002	2003
Dailies	9	-	9	10	10
Sundays	8	-	9	10	10

Source: Newspaper Society, ZenithOptimedia

Regional newspapers internet publishing

(No. of online editions)

	1999	2000	2001	2002	2003
Dailies	88	-	114	-	90
Non-dailies	472	-	549	-	640
Sundays	-	-	-	-	13

Source: Newspaper Society

Media consumption (minutes per day)

	2003
Regional newspapers	30.4

Source: Newspaper Society database (Nov 2003)

Newspaper colour capability & formats

Number of:	1998	1999	2000	2001	2002
4-colour national newspapers	10	10	10	10	10
4-colour regional newspapers	-	-	-	92	109
National					
Broadsheets	5	5	5	5	5
Tabloids	5	5	5	5	5
Regional					
Broadsheets	20	16	15	-	-
Tabloids	69	80	79	-	-

Source: Newspaper Society

Regional newspaper formats (%)

Proportion of:	2002
Broadsheets	13
Tabloids	87

Source: Newspaper Society



Average cover prices (single copy)

	£
National daily	0.25
National Sunday	0.56
Regional morning	0.32-0.50
Regional evening	0.25-0.5
Regional Sunday	0.40-1.00
Regional weekly	0.20-0.75

Source: Newspaper Society database February 2003, Advertising Association

Employment (regional press 2001)

	1997	1998	1999	2000	2001
Total no. of journalists	8,910	8,640	8,721	8,775	8,000
Total no. of employees	33,000	32,000	32,300	32,500	34,000

Source: Newspaper Society

Top ten advertising categories in regional daily newspapers (2003)

Advertising sector	% of display ad revenue
Retail	28.5
Household equipment	10.5
Entertainment & the media	10.0
Motors	9.2
Business & industrial	7.4
Travel & transport	7.2
Government, social & political organisations	5.9
Finance	5.0
Multi advertisers	2.7
Pharmaceutical	2.5

Source: Nielsen Media Research/Multimedia

Top ten advertising categories in national newspapers (Jul 2002-Jun 2003)

Advertising sector	Newspaper expenditure £ (mill)
Retail	411.6
Finance	392.4
Motors	374.5
Travel & transport	282.3
Business & industrial	204.1
Computers	195.3
Mail order	183.1
Entertainment & the media	151.9
Government, social & political organisations	74.1
Household equipment	60.1

Source: AC Nielsen MMS

Top ten regional daily newspaper advertisers (2003)

Advertiser
DFS Furniture
COI Communications
British Telecom
Lidl Discount Food Stores
Arnold Clark Motors
Specsavers Optical Group
Ford
Renault
Asda Stores
Volkswagen

Source: Nielsen Media Research/Multimedia

Top ten national newspaper advertisers (Jul 2002-Jun 2003)

Advertiser	Newspaper expenditure £ (mill)
British Telecom	36.8
PC World Computer Superstore	35.8
Ford Motor Company	33.5
COI Communications	33.0
Time Computers	31.2
DFS Furniture	29.2
Toyota	27.7
Vauxhall Motors	25.3
British Sky Broadcasting	22.8
Currys Group	22.5

Source: AC Nielsen MMS

Top ten regional publishing companies (2003)

	Weekly circulation
Trinity Mirror	15,592,172
Newsquest (Media Group)	10,552,859
Northcliffe Newspapers	9,108,571
Johnston Press	8,362,331
Associated Newspapers	6,415,350
ARCHANT	3,040,355
Guardian Media Group	2,609,800
The Midland News Association	2,171,200
D.C. Thomson & Co.	1,243,894
Scotsman Publications	1,149,880

Source: Newspaper Society database (Jan 04)

Top ten national publishing companies (2003)

(ranked by total weekly circulation)

News International
Trinity Mirror
DMGT
Northern & Shell
Hollinger
Guardian Media Group
Independent Newspapers
Pearson
Barclay Brothers
Sport Newspapers

Source: ZenithOptimedia

ADVERTISING EXPENDITURE & ECONOMIC DATA

Advertising expenditure

(£ million, in current prices)

	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
Newspapers	3,035	3,305	3,581	3,803	4,262	4,165	4,056	4,086	4,168	4,203	4,244
Magazines	1,367	1,508	1,639	1,643	1,725	1,692	1,601	1,557	1,566	1,582	1,599
Television	2,442	2,678	2,912	3,121	3,327	3,010	3,144				
Radio	262	301	352	395	455	414	418				
Cinema	62	75	82	105	109	139	154				
Outdoor	364	425	479	506	592	575	587				
Internet	0	7	16	43	132	141	162				
Total	7,532	8,299	9,061	9,616	10,602	10,137	10,121	10,304	10,663	10,996	11,361

Source: 1996-2002 Advertising Association, 2003-2006 ZenithOptimedia

Notes: Excludes 15% agency commission, newspapers, magazines, television and radio exclude production costs, cinema and outdoor include production costs, includes classified advertising, after discounts.



Main economic indicators 1996-2002

	1996	1997	1998	1999	2000	2001	2002
1 US\$=	0.67						
	£ at 2002 rate						
Gross Domestic Product (£ billion)							
at current prices	762	811	859	902	950	993	1,043
% change	6.0	6.4	6.0	5.0	5.3	4.5	5.1
at 2002 prices	878	905	928	960	982	1,008	1,043
% change	3.5	3.1	2.5	3.4	2.3	2.6	3.5
Gross Domestic Product per capita (£ 000)							
at current prices	13.0	13.7	14.5	15.2	16.0	16.7	17.5
at 2002 prices	14.9	15.3	15.7	16.1	16.5	16.9	17.5
Population							
Millions	58.8	59.0	59.2	59.5	59.5	59.5	59.5
Consumer Price Index							
2002=100	86.8	89.6	92.6	94.0	96.8	98.6	100.0
% change	2.4	3.2	3.4	1.5	2.9	1.8	1.5
Ad.spend as a % of GDP							
	0.99	1.02	1.05	1.07	1.12	1.02	0.97
Advertising Expenditure Growth (%)							
at current prices	7.8	10.2	9.2	6.1	10.3	-4.4	-0.2
at 2002 prices	5.3	6.7	5.6	4.5	7.1	-6.1	-1.6

Source: IFS, ZenithOptimedia

Research

Circulation is audited by: ABC (Audit Bureau of Circulation) and VFD (Verified Free Distribution)

Readership is measured by: NRS (National Readership Survey)

Methodology: JICREG, Joint Industry Committee for Regional Press Research – combines researched and modelled data to produce readership data at postcode sector level for most regional and local newspapers.

Taxes

VAT on: sales 0 advertising 17.5%
 newsprint 17.5% plant 17.5%
 composition 17.5% (standard VAT rate 17.5%)

Newspaper profits are taxed at the standard corporation rate: 10% for first £10,000 then 20% for small companies and 30% for large (profits > £1.5 million).

Subsidies

Are there subsidies for the purchase of newsprint? No

Are loans granted at low interest rates for re-equipping or improving existing equipment? No, but plant may be depreciated at the usual straight-line rate of 25% a year.

Discounts

on: post 0* rail 0 telephone 0 telegraph 0 telex 0

Newspapers are currently treated as first-class post. The Post Office has threatened to end this concession and is now negotiating with publishers.

Ownership

Does any law exist governing publishing-house ownership, or the registration of shares in newspaper-publishing companies? Yes. Newspapers are regulated under the provisions of the

Communications Act 2003.

Is there any law prohibiting or restricting foreign companies or individuals from owning shares, and in particular, the majority of shares, of domestic daily newspapers? No

Is there any law prohibiting daily newspaper or periodical publishers from operating radio or television stations in the same locality? Yes. The Communications Act 2003 stipulates that in every local area of the UK there must be at least three separate commercial media companies providing newspapers, radio, and terrestrial television (i.e. with a licence to broadcast on the ITV frequency). Nobody controlling more than 20% of national newspaper circulation may own more than 20% of an ITV licence. Nobody owning a regional ITV licence may control more than 20% of the newspaper market in that region. Nobody owning a regional ITV licence may own a local radio station with more than 45% coverage of the same area (in areas where there are three or more stations). Nobody owning a local newspaper may own a local radio station where the newspaper accounts for more than 50% of the circulation within the station's coverage area (in areas where there are three or more stations).

So as to guarantee disclosure and transparency in the capital structure and to avert silent partnerships, is there a law or rule making it possible to determine who actually owns a publishing company? The general provisions of UK company law concerning the registration of non-corporate publishers both require individuals to be named.

Is there an antitrust law limiting concentration in the daily press? Under the Communications Act 2003, any cross-media ownership activity will trigger a public-interest test that aims to ensure: plurality of ownership; economic benefits; no detrimental effect to the market.

Is further regulation of media concentration expected? No

POPULATION

Population by age and sex

	All individuals		Male		Female		Households 000
	000	%	000	%	000	%	
18-24	27,352	13	13,694	14	13,658	13	109,661
25-34	38,705	18	19,210	19	19,495	18	
35-44	44,311	21	21,791	22	22,520	21	
45-54	39,556	19	19,291	19	20,265	19	
55-64	25,899	12	12,356	12	13,543	12	
65+	33,834	16	14,221	14	19,613	18	
Total	209,657	100	100,563	100	109,094	100	

Source: Mediamark Research Inc., Fall 2003

Working population by social class and sex

	All adults		Male		Female	
	000	%	000	%	000	%
A+B	42,347	43	20,940	41	21,407	45
C1= clerical/s	38,093	39	13,732	27	24,361	51
C2	14,179	14	13,055	26	1,124	2
D	4,202	4	3,270	6	932	2
Total	98,821	100	50,997	100	47,824	100

Source: Mediamark Research Inc., Fall 2003

A= executive/managerial administrative

B= professional/professional specialties

C1= clerical/sales/technical

C2= precision/crafts/repair

D= handlers/equipment cleaners/helpers/labourers

Age structure of readership

Age	% of readership	% daily reach within age group
18-24	9	40
25-34	14	41
35-44	20	50
45-54	21	59
55-64	15	65
65+	21	71

Source: Scarborough Research, 2003 Release 1 (Top 50 Market Report)

Housewives (co-habiting persons)

	Housewives	
	000	%
18-24	2,066	5
25-34	7,756	18
35-44	10,759	25
45-54	9,608	22
55-64	6,399	15
65+	6,175	14
Total	42,763	100

Source: Mediamark Research Inc., Fall 2003

Households

Occupancy	Households	
	000	%
1 person	28,274	26
2 people	34,827	32
3 people	18,283	17
4 people	16,455	15
5 or more people	11,822	11
without children	68,148	62
with children	41,513	38
with children aged 0-3	14,064	13
with children aged 4-9	19,265	18
with children aged 10-15	20,001	18
Total	109,661	100

Source: Mediamark Research Inc., Fall 2003

Newspaper reach (%)

	Daily
All adults	54
Men	57
Women	52

Source: Scarborough Research, 2003 Release 1 (Top 50 Market Report)

NUMBER OF TITLES AND CIRCULATION

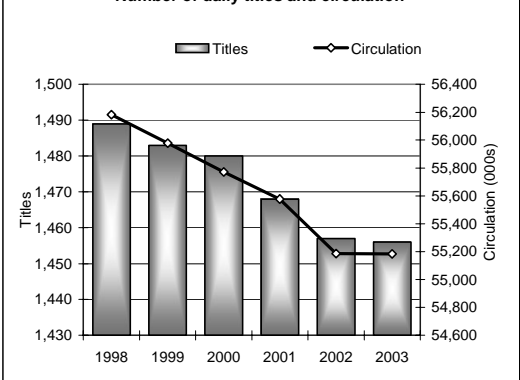
	1998	1999	2000	2001	2002	2003 *	Change (%)	
							98/2003	2002/03
Number of titles								
Dailies	1,489	1,483	1,480	1,468	1,457	1,456	-2.22	-0.07
Morning	721	736	766	776	777	787	9.15	1.29
Evening	781	760	727	704	692	680	-12.93	-1.73
Sundays	897	905	916	913	913	917	2.23	0.44
Circulation (000)								
Total dailies	56,182	55,979	55,773	55,578	55,186	55,185	-1.77	0.00
Morning	45,643	45,997	46,772	46,821	46,617	46,930	2.82	0.67
Evening	10,539	9,982	9,000	8,757	8,569	8,255	-21.67	-3.66
Sundays	60,066	59,894	59,421	59,090	58,780	58,495	-2.62	-0.49
Total annual sales (millions of copies)								
Dailies	17,529	17,465	-	-	-	-	-	-
Sundays	3,145	3,055	-	-	-	-	-	-

Source: NAA

"All-day" newspapers publish more than one edition throughout the day. The separate editions are listed in both morning and evening lines, but included only once in the total. Circulation for these newspapers is divided equally between the morning and evening lines.

*Preliminary

Number of daily titles and circulation



MORE FACTS

Newsprint costs

	1997	1998	1999	2000	2001
Newsprint costs (average per ton)					
US\$	546	587	514	558	551

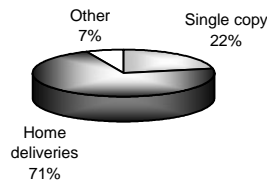
Source: Resource Information Systems, Inc.



Type of newspaper sales (%)

	Single copy	Home deliveries	Other
2000	19	76	5
2001	-	-	-
2002	22	71	7

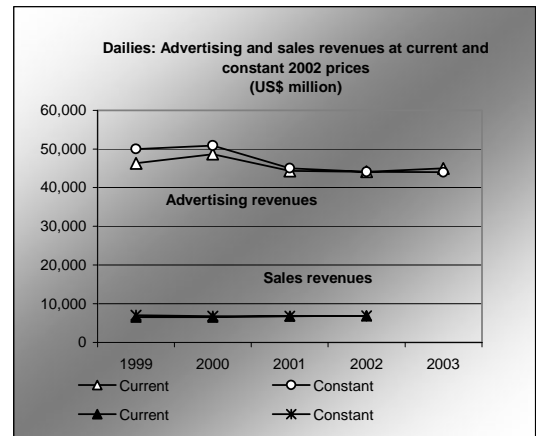
Type of newspaper sales in 2002 (%)



	1999	2000	2001	2002	2003	Change (%)	
						99/2003	2002/03
Advertising revenues (US\$ million)							
Dailies	46,289	48,670	44,305	44,102	44,939	-2.92	1.90
Dailies §	49,980	50,824	44,991	44,102	43,972	-12.02	-0.30
Sales revenues (US\$ million)							
Dailies	6,475	6,508	6,690	6,830	-	5.48	2.09
Dailies §	6,991	6,796	6,794	6,830	-	-2.31	0.54
Sundays	3,997	4,033	4,093	4,196	-	4.98	2.52

§ at constant 2002 prices * figures refer to 99/2002 and 2001/02

Source: NAA



Top dailies (2003)

Title	Publisher	Largest reported circulation (000)
USA Today	Gannett Company Inc.	2,617
The Wall Street Journal	Dow Jones & Co. Inc.	2,091
New York Times	New York Times Company	1,677
Los Angeles Times	Tribune Publishing Company	1,379
The Washington Post	Washington Post Company	1,030
Chicago Tribune	Tribune Publishing Company	1,002
New York Daily News	New York Daily News	805
The Dallas Morning News	Belo Corporation	786
Denver Post / Rocky Mountain News	The E.W. Scripps Company/Media News Group, Inc.	786
Philadelphia Inquirer	Knight Ridder, Inc.	750
Houston Chronicle	Hearst Newspapers	747
The Detroit News / Free Press	Gannett Company Inc./Knight Ridder, Inc.	721
Boston Globe	New York Times Co.	706
Long Island Newsday	Tribune Publishing Company	678
Minneapolis Star Tribune	McClatchy Newspapers, Inc.	678
New York Post	New York Post Corp.	652
Atlanta Journal Constitution	Cox Newspapers	622
The Newark Star-Ledger	Advance Publications, Inc.	611
San Francisco Chronicle	SF Chronicle Division of Hearst Communications Inc.	561
The Arizona Republic	Gannett Company Inc.	548

Source: ABC's FAS-FAX ending September 30, 2003

Top ten retail advertising categories (2003)

Category	% of display ad expenditure
General merchandise	32.7
Finance	15.3
Home supplies/furniture	14.4
Computers/electronics	11.4
Food	9.4
Hobbies/toys/sports	5.6
Building materials	4.6
Apparel & accessories	3.9
Auto aftermarket	1.9
Records/books/cards	0.9

Top ten publishing companies (2001)

(ranked by total revenue)
Gannett Company, Inc.
Tribune Publishing Company
Knight Ridder
The New York Times Company
Advance Publications
Dow Jones & Company
Cox Enterprise
The Hearst Corporation
McClatchy
Media News Group

Source: AdAge

Top ten advertisers (2002)

Advertiser
Federated Dept. Stores
May Dept. Stores
Ford Motors (local dealers)
General Motors
AT & T Wirelss
News Corp
Verizon Communications
DaimlerChrysler
SBC Communications
Valassis Communications

Source: Competitive Media Reporting (preliminaries)

Internet publishing (No. of online editions)

	1999	2000	2001	2002	2003
Dailies	1,149	1,207	-	1,296	1,343

Source: NNA

Cover prices (dailies - 2000)

	US\$
Single copy	0.25-2.00
Subscription	0.18-0.78



Top ten national advertising categories (2003)

Category	% of display ad expenditure
Public services/utilities	23.9
Travel & transport	16.6
Film	14.9
Coupon marketing organisation	11.9
Auto	8.8
Publishing/media	5.0
Miscellaneous	3.1
Politics/government	2.9
Computer equipment	2.9
Mail order	2.2

Media consumption (minutes per day *)

	2001	2002	2003
Typical daily newspaper	28.2	27.0	25.0
Typical Sunday newspaper	-	64.1	73.1
Magazines	19.8	-	-
Radio	191.4	-	-
Television	191.3	-	-
Internet	32.4	-	-

Source: The Readership Institute, Impact Study

* for total adults 18+

Employment

	1998	1999	2000	2001	2002
Total no. of Employees	440,800	442,200	445,000	-	388,500

Source: US Bureau of Labor Statistics

Newspaper colour capability & formats

Number of:	1999	2000	2001	2002
4-colour newspapers	1,409	-	1,402	-
Broadsheets	1,442	-	-	1,417
Tabloids	41	-	-	44
Others	-	-	-	-

ADVERTISING EXPENDITURE & ECONOMIC DATA

Advertising expenditure

(US\$ million, in current prices)

	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
Newspapers	37,077	39,079	41,341	43,697	48,700	45,778	45,320	46,227	48,076	49,999	50,999
Magazines	12,994	13,748	14,573	15,593	17,700	15,930	15,611	16,548	17,541	18,593	19,895
Television	38,472	40,709	43,471	47,299	52,258	49,714	51,640				
Radio	12,412	13,794	15,411	18,581	20,819	18,800	19,423				
Cinema	0	0	0	0	0	0	275				
Outdoor	3,597	3,802	4,027	4,565	4,912	4,814	4,945				
Internet	300	906	1,920	4,600	6,000	6,600	7,250				
Total	104,852	112,038	120,743	134,335	150,389	141,636	144,464	147,168	155,277	161,332	168,007

Source: 1996-2002 NAB; IOA; TVB; LNA; CAB; RAB; MPA; Paul Kagan Associates, 2003-2006 ZenithOptimedia

Notes: Includes agency commission, production costs and classified advertising, after discounts

Main economic indicators 1996-2002

	1996	1997	1998	1999	2000	2001	2002
Gross Domestic Product (US\$ billion)							
at current prices	7,813	8,318	8,782	9,274	9,825	10,082	10,446
% change	5.6	6.5	5.6	5.6	5.9	2.6	3.6
at 2002 prices	8,960	9,322	9,681	10,014	10,259	10,238	10,446
% change	4.2	4.0	3.9	3.4	2.5	-0.2	2.0
Gross Domestic Product per capita (US 000)							
at current prices	29.4	31.0	32.5	34.0	35.7	35.4	36.7
at 2002 prices	33.8	34.8	35.8	36.7	37.3	35.9	36.7
Population							
Millions	265.5	268.0	270.6	272.7	275.3	284.8	284.8
Consumer Price Index							
2002=100	87.2	89.2	90.7	92.6	95.8	98.5	100.0
%change	2.9	2.3	1.7	2.1	3.4	2.8	1.5
Ad.spend as a % of GDP	1.34	1.35	1.37	1.45	1.53	1.40	1.38
Advertising Expenditure Growth (%)							
at current prices	6.9	6.9	7.8	11.3	12.0	-5.8	2.0
at 2002 prices	3.9	4.4	6.0	9.0	8.3	-8.4	0.4

Source: IFS, ZenithOptimedia

Research

Circulation is audited by: Audit Bureau of Circulations (ABC)

Readership is measured by: Mediamark Research Incorporated (MRI).

Methodology: Data gathered by annual interviews.

Taxes

VAT on: sales 0 advertising 0
newsprint 0 plant 0
composition 0 (standard VAT rate 0)

Newspaper advertising expenditure (US\$ million)

	2000	2001	2002
National	7,653	7,004	7,210
Retail	21,409	20,679	20,994
Classified	19,608	16,622	15,898
Total	48,670	44,305	44,102

Source: NAA

Discounts

on: post 0 rail 0 telephone 0 telegraph 0 telex 0

Ownership

Does any law exist governing publishing-house ownership, or the registration of shares in newspaper-publishing companies? No

Is there any law prohibiting or restricting foreign companies or individuals from owning shares, and in particular, the majority of shares, of domestic daily newspapers? No



Is there any law prohibiting daily newspaper or periodical publishers from operating radio or television stations in the same locality? A daily newspaper is prohibited from owning a radio or television station in its home market. This law took effect in 1975 but was not retrospective, so some newspapers do still own local stations

So as to guarantee disclosure and transparency in the capital structure and to avert silent partnerships, is there a law or rule making it possible

to determine who actually owns a publishing company? No

Is there an antitrust law limiting concentration in the daily press? Federal antitrust laws apply to all businesses, including newspapers.

Is further regulation of media concentration expected? The Federal Communications Commission has proposed to loosen cross-media ownership restrictions.

POPULATION & MORE FACTS

Population by age and sex (2002)

	All individuals		Male		Female	
	000	%	000	%	000	%
0-15	504	15	242	15	262	15
16-24	436	13	210	13	226	13
25-34	573	17	276	17	297	17
35-44	470	14	226	14	244	14
45-54	402	12	193	12	209	12
55-64	470	14	226	14	244	14
65+	504	15	242	15	262	15
Total	3,359	100	1,615	100	1,744	100

Source: Equipos

Population by social class and sex (2002)

	All individuals		Male		Female	
	000	%	000	%	000	%
AB	269	8	130	8	139	8
C1	336	10	161	10	175	10
C2	639	19	307	19	332	19
D	973	29	468	29	505	29
E	1,143	34	550	34	593	34
Total	3,360	100	1,616	100	1,744	100

Source: Equipos

AB= higher & intermediate managerial

C1= supervisory/clerical

C2= skilled manual

D= semi & unskilled manual

E= subsistence/inactive

Age structure of readership (2002)

Age	% reach within age group
15-29	26
30-49	32
50-59	12
60+	30

Newspaper reach (% - 2002)

	Daily
All adults	23.9
Men	25.2
Women	22.7

NUMBER OF TITLES AND CIRCULATION

	2000	2001	2002	2003	Change (%)	
					00/2003	2002/03
Number of titles						
National dailies	4	4	4	4	0.00	0.00
Circulation (000) *						
Total dailies	42	38	-	30	-28.57	-
Total annual sales (millions of copies) *						
Dailies	15	13.6	-	10.9	-27.71	-

* figures refer only to El Pais

MORE FACTS

	1999	2000	2001	2002	2003	Change (%)	
						99/2003	2002/03
Advertising revenues (Pesos million)							
Dailies	-	497	328	279	325	-34.61	16.49
Dailies \$	-	591	373	279	300	-49.32	7.36
Sales revenues (Pesos million) *							
Dailies	-	222	272	209	241	8.46	15.31
Dailies \$	-	264	310	209	222	-15.94	6.28
Volume of advertising sold (pages & page equivalents)							
Total	-	4,339	-	3,723	7,198	65.89	93.34

\$ at constant 2002 prices

figures refer only to El Pais

Newspaper colour capability & formats

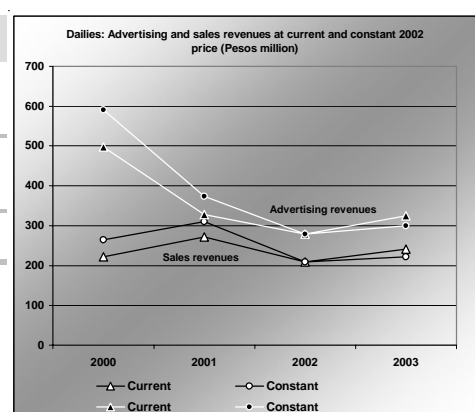
Number of:	2002	2003
4-colour newspapers	4	4
Broadsheets	1	1
Tabloids	3	3

Source: El Pais

Employment & salary

	2002	2003
Total no. of Journalists	145	87
Total no. of Employees	586	570
Total salary costs		
Pesos (000)	12,233	-

Source: El Pais



Contribution of classified, display and insert advertising to total advertising income (%)

	2000	2001	2002	2003
Display	53	52	58	57
Classified	45	46	41	42
Inserts	2	2	1	1

Source: El Pais

Figures refer only to El Pais



Type of newspaper sales (%)	Cover prices			Distribution costs			
	Single copy	Home deliveries	Postal deliveries	Pesos		2001	2002
				Single copy	25-30		
2001	100	-	-				
2002	100	-	-				
2003	100	-	-				
As % of average cover price							
Single copy sales						40.0	40.0
Newsprint costs (average per ton)							
Pesos						-	10,600
Euro						-	407

Internet publishing (No. of online editions)

	1999	2000	2001	2002	2003
Dailies	-	3	3	3	3

Online readership (page impressions per month)

Newspaper		2003
El País	Elpais.com.uy	1,650,000
El Observador	Observa.com.uy	-
La Republica	Diariolarepublica.com	-

Source: El País

Top advertising categories (2003)

Advertising sector	% display ad revenue
Government/public bodies	14.1
Sales and auctions	9.9
Agricultural	6.8
Banks	5.5
Auto	3.9
Services	3.8
Cosmetics	3.6
Health	3.5
Education	3.2
Pharmaceutical	2.4

Source: El País

Top dailies (2002)

Title	Circulation (000)	Readership (000)	Format	Full page rate (Pesos)	
				Mono	Colour
El País	58	131	Broadsheet	181,438	336,956
La República	23	52	Tabloid	64,865	138,996
El Observador	22	90	Tabloid	138,972	238,237
Ultimas Noticias	16	-	Tabloid	52,920	63,504

Top publishing companies (2002)

(ranked by total circulation)

El País
La República
El Observador
Ultimas Noticias

ADVERTISING EXPENDITURE & ECONOMIC DATA

Advertising expenditure

(US\$ million, in current prices)

	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
Press	41	43	43	40	34	16	7	6	6	5	6
Television	85	90	94	88	75	51	25				
Radio	21	23	25	25	22	12	7				
Outdoor/other	15	16	18	16	16	19	10				
Cinema	0	0	0	0	0	2	1				
Internet	0	0	1	2	2	1	1				
Total	162	172	181	171	149	100	50	43	45	44	48

Source: 1996-2002 Asociación Uruguaya de Agencias de Publicidad, 2003-2006 ZenithOptimedia

Notes: Excludes production costs (c.10%) and agency commission, includes classified advertising, after discounts.

Main economic indicators 1996-2002

	1996	1997	1998	1999	2000	2001	2002
1 US\$=	13.32						
	Pesos at 2002 prices						
Gross Domestic Product (Pesos billion)							
at current prices	163.5	204.9	234.3	237.1	243.0	248.6	252.8
% change	33.5	25.3	14.3	1.2	2.5	2.3	1.7
at 2002 prices	285.8	298.9	308.4	295.5	289.0	283.4	252.8
% change	4.0	4.6	3.2	-4.2	-2.2	-2.0	-10.8
Gross Domestic Product per capita (Pesos 000)							
at current prices	50.5	62.7	71.2	71.7	72.8	74.0	75.2
at 2002 prices	88.2	91.4	93.7	89.3	86.5	84.3	75.2
Population							
Millions	3.2	3.3	3.3	3.3	3.3	3.4	3.4
Consumer Price Index							
2002=100	57.2	68.6	76.0	80.2	84.1	87.7	100.0
% change	28.3	19.8	10.8	5.6	4.8	4.3	14.0
Ad.spend as a % of GDP							
	0.79	0.79	0.81	0.82	0.74	0.54	0.42
Advertising Expenditure Growth (%)							
at current prices	12.2	6.3	5.2	-5.5	-12.7	-33.0	-50.0
at 2002 prices	9.8	5.1	5.3	-3.2	-11.1	-29.3	-30.0

Source: IFS, ZenithOptimedia

General economic situation

GDP total US\$66.06 billion; GDP per capita US\$2,543 (purchasing power parity; 2002). Consumer price index 126 (2001).

Performance of newspapers vs. other media

The state TV and radio company Uzteleradio broadcasts in Uzbek, Russian and also in Kazakh, Kirghiz, Tadjik, Uyghur, Turkish, Korean and German on four channels. A cable television joint venture between the state broadcasting company and a foreign company broadcast the Hong Kong-based Star television channels, including the British Broadcasting Company (BBC), Deutsche Welle, and Cable News Network World News, to Tashkent and a few other locations. Access to cable television was beyond the financial means of most citizens. There were between 30 and 40 privately owned local television stations and seven privately owned radio stations. In general broadcasters practised self-censorship but enjoyed some ability to report critically on local government. For the most part, television programming consisted of re-broadcasting Russian programming.

Performance of different types of newspapers

There are over 400 newspapers in Uzbekistan, about 20 read nationwide. They are mainly owned by the government, state companies, political parties and some state organisations. All seven national daily newspapers were owned or controlled by government entities, and their headquarters were jointly located in the same building. Their combined readership in 1999, the most recent year for which reliable statistics were available, was 81,000, down from 544,000 just after independence. Newspapers, which cost between 5 and 15 cents (50-150 soum) each, were too expensive for most citizens. A handful of private newspapers containing advertising, horoscopes, and similar features, but no news or editorial content, were allowed to operate. There were several independent national newspapers, including *Novosti Nedelya*, *Vremya i My*, and *Hurriyat*.

Newspaper launches/closures

In 2002 the weekly *New Newspaper – Parvina* was launched by the private commercial bank Parvina-bank and the companies Parvina and Parvina-kuruvchi. The initial circulation of the broadsheet was 5,000 copies.

Distribution

There were no private printing houses. Newspapers generally were printed by state-owned printing houses.

Media/press laws

While formal censorship of the press was abolished in May 2002 by shifting responsibilities directly to editors, a new organization - the Uzbek Press and Information Agency -

replaced the State Press Committee and became responsible for observing all media. The next month, administration officials removed the chief editor of the weekly newspaper *Mohiyat* following the publication of an article on press freedom. Other newspaper editors quickly hired former government censors to vet all material prior to publication.

Libel and defamation of the president remain criminal offences.

Private persons and journalist collectives may not establish newspapers unless they meet the media law's standards for establishment of a "mass media organ", including founders acceptable to the government.

The Mass Media law established the Interagency Coordination Committee (MKK), which issues both broadcast and mass media licences to approved media outlets. In October 2000 a new law extended the term of validity of the broadcast licences from one year to five years; however, mass media licences, which also are a requirement, still must be renewed annually. The MKK is empowered to revoke licences and close media outlets without a court judgment. Another government agency – the Centre for Electromagnetic Compatibility (TSEMS) – issues frequency licences. In the past television stations often encountered difficulty obtaining licences; however, no such difficulties were reported during the year. Because the registration committee met irregularly, many independent television stations were forced at times to operate with expired licences, making them vulnerable to government closure. In 2001 several independent television stations had problems renewing their licences or exercising their legal right to control their stations' operations.

Distribution

The government did not allow the general distribution of foreign newspapers and other publications; however, two or three Russian newspapers and a variety of Russian tabloids and lifestyle publications were available. A modest selection of other foreign periodicals was available in Tashkent's major hotels, and authorized groups could obtain foreign periodicals through subscription.

State support

The government subsidizes a very limited number of newspapers.

Journalists' associations

The government dominates the main journalists' union, and there are no independent journalists' associations.

Sources: CIA – *The World Factbook 2003*; US State Department; CASCEN; *Freedom House*; *BBC News*

POPULATION & MORE FACTS

Population by age and sex

	All individuals		Male		Female	
	000	%	000	%	000	%
0-14	9,027	35	4,595	36	4,432	34
15-64	15,727	61	7,782	60	7,945	61
65+	1,228	5	498	4	730	6
Total	25,982	100	12,875	100	13,107	100

Source: CIA – *The World Factbook 2003*

Top dailies (2002)

Title
Khalq Sozi
Narodnoye Slovo
Pravda Vostoka

Source: *BBC News*

VANUATU

General economic situation

GDP total US\$563 million; GDP per capita US\$2,829 (purchasing power parity; 2002). Consumer price index 103.2 (2001).

Performance of newspapers vs. other media

The government controls much of the country's media, including one AM and one FM radio station, a weekly newspaper and a limited-service television station that broadcasts only to the capital of Port Vila.

Performance of different types of newspapers

At least three private newspapers compete with the

government newspaper *Vanuatu Weekly*: the independent daily newspaper *Trading Post* (published five times a week Tuesday-Saturday), a privately owned weekly newspaper, and another weekly newspaper published by a political party. The government-owned newspaper in Vanuatu is bound by the constitution to print in three languages, English, French and bislama (the local 'pidgin' English language). *Trading Post* is primarily in English but letters and sports news are published in bislama.

Sources: CIA - The World Factbook; U.S. State Department; Freedom House; Commonwealth Press Union News

POPULATION & MORE FACTS

Population by age and sex

	All individuals		Male		Female	
	000	%	000	%	000	%
0-14	69	35	35	34	34	35
15-64	123	62	63	62	60	62
65+	7	4	4	4	3	3
Total	199	100	102	100	97	100

Source: CIA - The World Factbook 2003

Top dailies (2002)

Title	Circulation (000)	Cover Price		Format
		A\$	US\$	
Trading Post	3	1.30	0.97	Tabloid

Source: Commonwealth Press Union News

	2003
Number of titles	
Total dailies	1
National dailies	1
Circulation (000)	
Total dailies	3

Source: WAN from public sources

VENEZUELA

POPULATION

Population by age and sex

	All individuals		Male		Female		Households 000
	000	%	000	%	000	%	
0-14	7,689	33	3,968	33	3,721	32	2,976
15-24	4,648	20	2,383	20	2,265	19	
25-34	3,813	16	1,921	16	1,892	16	
35-44	3,049	13	1,506	13	1,543	13	
45-54	2,097	9	1,033	9	1,064	9	
55-64	1,154	5	564	5	590	5	
65+	1,091	5	499	4	592	5	
Total	23,541	100	11,874	100	11,667	100	

Source: IDB

Population by social class and sex

	All adults		Male		Female	
	000	%	000	%	000	%
AB	1,176	5	593	5	583	5
C	3,060	13	1,544	13	1,517	13
D	7,063	30	3,563	30	3,500	30
E	12,241	52	6,175	52	6,067	52
Total	23,541	100	11,874	100	11,667	100

Source: Datos I.R.

AB = university professors, business professionals, house/luxury apartment owners, multiple car owners, frequent travellers.

C = middle executives, small retailers, live in rented house/apartments, comfortably well off.

D = live in modest houses with little or no luxury, office workers, clerks, civil servants.

E = live in impoverished conditions, without adequate services, unskilled workers, travelling salespeople, farmers.



MORE FACTS

Top dailies (2001)

Title	Circulation (000)	Readership (000)	Full page rate (US\$)	
			Mono	Colour
Meridiano	360	996	1,750	2,800
Ultimas Noticias	350	1,257	1,110	1,776
El Universal	300	1,719	4,309	6,894
El Nacional	250	1,424	4,285	6,856
El Mundo	203	177	3,240	5,184
2001	180	233	2,730	4,368
Economía Hoy	15	33	1,400	2,240
Panorama	145	1,057	3,033	4,853
El Carabobeño	100	256	2,910	4,656
El Tiempo	78	647	1,776	2,842

Source: CVI, Datos I.R.

ADVERTISING EXPENDITURE & ECONOMIC DATA

Main economic indicators 1996-2002

	1996	1997	1998	1999	2000	2001	2002
1 US\$= 723.67 Bolivars at 2002 rate							
Gross Domestic Product (Bolivars billion)							
at current prices	29,438	43,344	52,483	62,577	82,451	91,325	105,042
% change	115.1	47.2	21.1	19.2	31.8	10.8	15.0
at 2002 prices	118,641	116,429	103,823	100,183	113,601	111,747	105,042
% change	7.6	-1.9	-10.8	-3.5	13.4	-1.6	-6.0
Gross Domestic Product per capita (Bolívar 000)							
at current prices	1,319	1,903	2,239	2,639	3,411	3,708	4,265
at 2002 prices	5,318	5,111	4,429	4,225	4,700	4,537	4,265
Population							
Millions	22.3	22.8	23.4	23.7	24.2	24.6	24.6
Consumer Price Index							
2002=100	24.8	37.2	50.5	62.5	72.6	81.7	100.0
% change	99.9	50.0	35.8	23.6	16.2	12.6	22.4
Ad.spend as a % of GDP							
	1.31	1.03	1.37	1.38	1.30	1.29	1.42
Advertising Expenditure Growth (%)							
at current prices	114.5	15.3	61.0	20.3	23.8	10.0	26.7
at 2002 prices	7.3	-23.2	18.6	-2.6	6.5	-2.3	3.5

Source: IFS, ZenithOptimedia

Advertising expenditure (Bolívar millions, in current prices)

	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
Newspapers	54,892	112,119	182,608	192,009	233,332	291,722	280,628	364,816	474,261	616,539	801,500
Magazines	5,503	10,715	11,958	13,674	18,524	25,121	29,686	38,591	50,169	65,219	84,785
Television	313,115	292,497	463,388	587,803	715,482	712,174	1,028,120				
Radio	5,798	6,656	24,520	19,571	35,132	67,244	56,624				
Cinema	2,000	10,000	19,357	23,228	30,197	36,236	43,484				
Outdoor	5,350	13,774	15,865	27,442	36,321	43,661	51,329				
Total	386,658	445,762	717,696	863,727	1,068,988	1,176,158	1,489,869	1,840,995	2,281,688	2,837,365	3,541,623

Source: 1996-2002 IVP 2003-2006 ZenithOptimedia

Notes: Before discounts, excludes production, classified and agency commission
Radio, cinema and outdoor are for Caracas only

POPULATION

Population by age and sex

	All individuals		Male		Female		Households 000
	000	%	000	%	000	%	
0-15	25,492	33	13,128	35	12,365	32	14,002 *
16-24	13,738	18	6,869	18	6,869	18	
25-34	11,601	15	5,572	15	6,030	16	
35-44	9,922	13	4,656	12	5,266	14	
45-54	6,640	9	3,511	9	3,129	8	
55-64	2,595	3	1,145	3	1,450	4	
65+	6,259	8	2,671	7	3,587	9	
Total	76,248	100	37,552	100	38,697	100	

Source: TNS

* Data available for 4 cities only - Hanoi, HCMC, Da Nang, Can Tho

Adult population by status and sex

	All adults		Male		Female	
	000	%	000	%	000	%
A	314	4	173	5	141	4
B	1,127	15	544	15	582	15
C	2,638	35	1,284	36	1,354	35
D	1,667	22	765	21	901	23
E/F	1,772	24	837	23	935	24
Total	7,517	100	3,604	100	3,913	100

Source: TNS

A = US\$ 1000+

B = US\$ 500-999

C = US\$ 300-499

D = US\$ 150-299

E/F = under US\$ 150

MORE FACTS

Top dailies (2002)

Title	Circulation (000)	Adult readership (000)	Full page rate (Lps)	
			Mono	Colour
Tuoi Tre	300	900	1,825	2,608
Thanh Nien	170	50	1,434	1,695
Saigon Giai Phong	150	400	2,581	3,657
Tien Phong	90	400	782	1,304
Nguoi Lao Dong	85	250	587	913
Lao Dong	80	240	1,147	1,506
Hanoi Moi	50	100	1,956	2,608
Vietnam News	25	120	730	2,000

Source: ZenithOptimedia

Top ten advertising categories (2001)

Advertising sector	Newspaper expenditure US\$ (000)
Motorbikes	2,162
Cars	1,999
Insurance	930
Mobile phones	836
Television	776
Beer	770
Corporate announcements	763
Tonics/vitamins	611
Language training	515
Computers	436

Source: TNS

Top ten advertisers (2001)

Advertiser	Newspaper expenditure US\$ (000)
Honda	530
Suzuki	435
Vietnam Brewery	431
Samsung	397
Ford	381
Toyota	379
Prudential Insurance	356
SYM-VMEP	332
Vinastar	308
Mercedes-Benz	298

Source: TNS

NUMBER OF TITLES AND CIRCULATION

Advertising expenditure

(US\$ million, in current prices)

	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
Newspapers	26	37	38	37	37	43	48	55	63	73	84
Television	53	50	49	56	71	80	90				
Radio	2	2	3	4	3	2	2				
Outdoor/transport	20	22	19	19	20	22	22				
Total	101	111	109	116	131	147	162	184	208	236	266

Source: 1996-2002 SRG Vietnam, ZenithOptimedia, 2003-2006 ZenithOptimedia

Notes: Includes classified advertising and agency commission, excludes production costs.
Before discounts.



Main economic indicators 1996-2002

	1996	1997	1998	1999	2000	2001	2002
1 US\$=	15,255						
	Dong at 2002 rate						
Gross Domestic Product (Dong billion)							
at current prices	272,037	313,624	361,016	399,942	444,646	484,492	538,412
% change	18.8	15.3	15.1	10.8	11.2	9.0	11.1
at 2002 prices	318,620	355,881	381,998	406,509	459,876	503,189	538,412
% change	12.4	11.7	7.3	6.4	13.1	9.4	7.0
Gross Domestic Product per capita (Dong 000)							
at current prices	3,609.8	4,177.2	4,743.3	5,186.0	5,723.3	6,118.9	6,799.8
at 2002 prices	4,228.0	4,740.0	5,019.0	5,271.1	5,919.4	6,355.0	6,799.8
Population							
Millions	75.4	75.1	76.1	77.1	77.7	79.2	79.2
Consumer Price Index							
2002=100	85.4	88.1	94.5	98.4	96.7	96.3	100.0
% change	5.7	3.2	7.2	4.1	-1.7	-0.4	3.9
Ad.spend as a % of GDP							
	0.57	0.54	0.46	0.44	0.45	0.46	0.46
Advertising Expenditure Growth (%)							
at current prices	60.7	9.9	-1.8	6.4	12.7	12.5	10.3
at 2002 prices	52.0	6.5	-8.4	2.2	14.6	12.9	6.2

Source: IFS, ZenithOptimedia

VIRGIN ISLANDS

General economic situation

GDP total US\$2.4 billion; GDP per capita US\$19,200 (purchasing power parity; 2001). Consumer price index 102 (1992).

Performance of newspapers vs. other media

The British Virgin Islands media include three radio stations, a local television station and a cable television operator.

Performance of different types of newspapers

The (US) *Virgin Islands Daily News* is the only daily newspaper. It is distributed on St. Thomas, St. Croix, St. John, and the British Virgin Islands of Tortola and Virgin Gorda. There are three weekly newspapers. The *Island Sun* is the oldest newspaper in the British Virgin Islands and is published on Fridays. The *BVI Beacon* is the second oldest, and the *Standpoint* (formerly *Pennysaver*) is a new publication on Tuesdays. Each island has newspapers unique to it. St. John has the *Tradewinds* and *The St. John Times*, St. Thomas has the *Virgin Islands*

Independent, and St. Croix has the *Avis*, also sold on St. Thomas. Other newspapers include *Nautical Times*, *The Island Trader*, and a few others published on and off throughout the year for tourists.

Distribution

In addition to local newspapers, there are regional and international publications including *San Juan Star* from Puerto Rico, *The Barbados Advocate*, *Wall Street Journal* (New York), and *New York Times*. There are also a number of newspapers from other Caribbean countries circulated on a delayed basis.

Codes of Ethics

The BVI Beacon is subscribing to the newly formed Eastern Caribbean Press Council, which mandates self-regulation among its members.

Sources: CIA – *The World Factbook 200*; WAN from public sources

POPULATION & MORE FACTS

Population by age and sex

	All individuals		Male		Female	
	000	%	000	%	000	%
0-14	33	26	17	29	16	24
15-64	80	64	36	62	44	66
65+	12	10	5	9	7	10
Total	125	100	58	100	67	100

Source: CIA 2003

Top dailies (2002)

Title	Print run (000)	Readership (000)
The Virgin Islands Daily News	17	50

Source: WAN from public sources

	2002
Number of national dailies	1

Source: UNESCO, WAN from public sources

WALLIS AND FUTUNA

General economic situation

GDP total US\$30 million; GDP per capita US\$1,875 (purchasing power parity; 2000). Consumer price index not available.

2. Performance of newspapers vs. other media

The only television and radio services are operated by the French overseas territories broadcasting service RFO.

Performance of different types of newspapers

There are no daily newspapers.

Newspaper launches/closures

In 2002 the only independent newspaper – the weekly *Te Fenua Fo'ou* – was forced to close after intense pressure by the king. *Te*

Fenua Fo'ou appeared in the territorial capital – Mata Utu – and it also circulated in New Caledonia where many people from Wallis and Futuna have migrated to work.

Sources: CIA – *The World Factbook 2003*; *International Press Institute*

POPULATION

Population by age and sex

	All individuals 000
Total	16

Source: CIA - *The World Factbook 2003*

YEMEN

General economic situation

GDP total US\$15.07 billion; GDP per capita US\$779 (purchasing power parity; 2002). Consumer price index 112.2 (2002).

Performance of newspapers vs. other media

The Ministry of Information controls all broadcasting through the Public Corporation for Radio and Television. Possession of satellite dishes is not restricted. Owing to the poor quality of local TV channels, many Yemeni families own satellite dishes. Most television-watching households watch news channels such as al-Jazeera to learn about international news. Sometimes al-Jazeera broadcasts Yemeni news more accurately and quickly than domestic TV channels or newspapers.

Performance of different types of newspapers

The newspapers are both private and state-controlled. The Ministry of Information granted more than 200 licences for political party and independent newspapers and magazines following unification in 1990. About 70 of these publications are still in operation.

Newspaper launches/closures

In 2002 the government closed down at least three publications after they published articles that were critical of the state or neighbouring countries, or for reporting on state security matters.

Circulation

The government controls most of the printing presses; only one newspaper – the thrice-weekly Aden independent *Al-Ayyam* – has its own press.

Ownership

There are no laws governing mixed-ownership newspapers as there are no private/public shared-ownership newspapers.

Media/press laws

The 1990 Press Law prohibits criticism of the president. Article 103 bars the media from publishing material that 'prejudices

religion', 'jeopardises the supreme interests of the country', and may 'raise tribal or sectarian divisions'. Penalties include up to a year in prison, a ban on practising journalism, and publication closure.

Libel is a criminal offence punishable by fines, flogging, and up to five years in prison for such ambiguous acts as 'humiliating the State' or publishing 'false information'.

In 2002 the government enforced a 2001 circular prohibiting publication of information or news pertaining to the armed forces before 'consulting' with the Ministry of Defence.

Press law regulations specify that newspapers must apply annually to the government for licensing renewal, and that they must show continuing evidence of about US\$4,375 (700,000 riyals) in operating capital.

Distribution

The government has frequently prevented a number of international newspapers such as *al-Hayat* and *Assharq Al-Awsat* from entering the country. The government claims that these publications threaten national security and sovereignty.

Taxes

Most of newspapers are not registered at the Ministry of Trade and Supply because they are not considered profit-making companies, so they are exempted from profit taxes. However, salary taxes are deducted on a monthly basis.

State support

The government provides subsidies to certain newspapers that are privately owned.

Sources: CIA – *The World Factbook 2003*; *Freedom House*; *US State Department*; *Al Ahram Weekly*; *Stanhope Centre UK*; *BBC News*; *Committee to Protect Journalists*

POPULATION & MORE FACTS

Population by age and sex

	All individuals		Male		Female	
	000	%	000	%	000	%
0-14	9,052	47	4,606	47	4,446	47
15-64	9,751	50	4,973	50	4,778	50
65+	547	3	273	3	274	3
Total	19,350	100	9,852	100	9,498	100

Source: CIA - *The World Factbook 2003*

Top dailies (2002)

Title	Publisher (language)
Al-Thawri	Yemeni Socialist Party
Al-Gumhuriyah	(in Ta'izz)

Source: WAN from public sources

	2002
Number of titles	
Total dailies	3
Non-dailies	8

Source: ArabNet

General economic situation

GDP total US\$8.24 billion; GDP per capita US\$799 (purchasing power parity; estimate July 2003). Consumer price index 121 (2002).

Performance of newspapers vs. other media

In addition to the government-controlled radio station, there were several church-related radio stations, two private commercial radio stations, and three community radio stations in the country. Radio Phoenix rebroadcast Voice of America (VOA), British Broadcasting Corporation (BBC), and South African Broadcasting Corporation (SABC) items. A Catholic radio network, Radio Yatsani continued broadcast operations; however, the government has not approved an application to add an associated television station. The radio license limited Radio Yatsani to three newscasts of three minutes each per day. Yatsani officially had permission to rebroadcast VOA and BBC transmissions; however, it first must have excerpts approved by the Ministry of Information, a censorship process that effectively eliminated timely rebroadcasts.

The government-owned ZNBC was the sole local-content television station. Multichoice, a telecommunications company based in South Africa, provided satellite and analogue wireless subscribers with television services. These services included broadcasts of Cable News Network (CNN), BBC World, Sky Television, and the SABC's Africa News. They also provided three BBC, one Radio France International, and VOA radio news broadcasts. None of the services included local news coverage. There was a second wireless television service, CASAT. Trinity Broadcasting Network, a foreign-based, church-related television network, broadcast a 24-hour transmission of pre-recorded religious programming from a rented studio at the former ZNBC complex.

Performance of different types of newspapers

The government owns and runs two dailies – *Times of Zambia* and *Zambia Daily Mail*, and the weeklies *Sunday Times*, *Sunday mail*, and *Financial Mail*. There is the sole privately owned daily, *The Post*. The weekly *Monitor* is owned by a group of journalists and the *National Mirror* weekly is owned by church organizations.

Circulation

The highest circulation newspaper is *The Post* with average circulation between 20,000 and 25,000. The two state-owned

dailies float between 15,000 and 20,000 copies. The *Monitor* prints about 10,000, while the *National Mirror* publishes between 5,000 and 6,000 copies. A part of the reason for the fall in figures is the rising production costs, especially newsprint imported at great cost.

Readership

Readership of the newspapers has been declining over the last 10 years. The prices of many newspapers have risen by as much as 500%, making them a luxury for the majority of Zambians.

Online/Digital Publishing

The leading private daily, the *Post*, has an internet website that attracted more than 15,000 readers per month. The government-controlled *Times of Zambia* and *Zambia Daily Mail* also had websites.

Media/Press Laws

There are over 20 pieces of legislation in the laws of Zambia which make the work of journalists difficult, including the Official Secrets Act, Public Order Act, and Defamation of the President. The law provides that investigative tribunals can call as witnesses journalists and media managers who print allegations of parliamentary misconduct. Failure to cooperate with a tribunal could result in charges of contempt punishable by up to six months in jail.

The private media supported the introduction of freedom of information, broadcasting, and independent broadcasting authority draft laws, which aim, respectively, to facilitate easier access to information held by official organs, to transform the state-owned Zambia National Broadcasting Corporation from a government propaganda organ to a public broadcaster, and to establish an independent regulator to regulate broadcasting.

Distribution

Most of the newspapers are distributed in urban centres – Lusaka, the capital, and Copperbelt towns. The rest of the country receives newspapers a day or three after the day of publication. Some towns rarely get newspapers, so there is almost no Zambian newspaper that can be truly labelled 'national.' Newspapers cover events in urban centres. There is very little rural content.

Sources: US State Department; Commonwealth Press Union; Freedom House

POPULATION & MORE FACTS

Population by age and sex

	All individuals		Male		Female	
	000	%	000	%	000	%
0-14	4,775	46	2,396	46	2,379	46
15-64	5,249	51	2,627	51	2,622	51
65+	283	3	131	3	152	3
Total	10,307	100	5,154	100	5,153	100

Source: CIA 2003

Top dailies (2002)

Title	Publisher	Circulation (000)
The Post	Post Newspapers Ltd	22
Times of Zambia	-	17
Zambia Daily Mail	-	17

Source: WAN from public sources

	2002
Number of titles	
Total national dailies	3
Circulation (000)	
Total national dailies	56

Source: WAN from public sources

POPULATION

Population by age and sex

	All individuals		Male		Female		Households 000
	000	%	000	%	000	%	
0-14	4,306	38	2,178	38	2,128	38	2,500 *
15-64	6,645	58	3,377	59	3,268	58	
65+	425	4	213	4	212	4	
Total	11,376	100	5,768	100	5,608	100	

Source: CIA

* 2000 data

MORE FACTS

Top dailies (2000)

Title	Circulation (000)	Adult readership (000)	Full page rate (ZW\$)	
			Mono	Colour
Herald (d)	110	524	70,875	94,235
Daily News (d)	105	420	23,310	37,555
Chronicle (d)	45	280	21,855	29,765

Source: ZenithOptimedia

Top ten advertising categories (1999)

Advertising sector	Newspaper expenditure ZW\$ (mill)
Alcoholic drinks	126.0
Financial institutions	75.3
High street shops	74.7
Engineering & manufacturing	28.3
Travel & tourism	27.0
Vehicles	22.9
Recruitment	18.5
Communications	17.9
Entertainment	14.6
Government	13.0

Source: Ad data

Top ten advertisers (1999)

Advertiser	Newspaper expenditure ZW\$ (mill)
Commercial Bank of Zimbabwe	8.7
OK Bazaars	7.9
Econet	6.5
TM Supermarket	6.2
Jaggers	5.8
Rainbow Stop	4.4
Net One	4.3
Standard Chartered Bank	4.0
Edgars	3.9
Castle Lager	3.2

Source: Ad data

NUMBER OF TITLES AND CIRCULATION

Main economic indicators 1996-2002

	1996	1997	1998	1999	2000	2001
1 US\$=	55	ZW\$ at 2002 rate				
Gross Domestic Product (ZW\$ billion)						
at current prices	85	102	136	215	-	-
% change	37.5	20.4	33.0	58.4	-	-
at 2001 prices	579	587	592	592	-	-
% change	13.3	1.4	0.9	-0.1	-	-
Gross Domestic Product per capita (ZW\$ 000)						
at current prices	7.1	8.3	10.7	16.4	-	-
at 2001 prices	48.6	47.8	46.7	45.3	-	-
Population						
Millions	11.9	12.3	12.7	13.1	12.6	-
Consumer Price Index						
2001=100	14.6	17.4	22.9	36.3	56.6	100.0
% change	21.4	18.8	31.8	58.5	55.9	76.7
Ad.spend as a % of GDP	0.40	0.44	0.43	0.40	-	-
Advertising Expenditure Growth (%)						
at current prices	27.2	35.2	27.6	49.2	-	-
at 2001 prices	4.8	13.8	-3.2	-5.8	-	-

Source: IFS, ZenithOptimedia

Advertising expenditure

(ZW\$ million, in current prices)

	1995	1996	1997	1998	1999
Newspapers	133	177	248	308	485
Magazines	33	33	60	70	66
Television	61	80	68	93	137
Radio	33	37	66	87	150
Outdoor	3	2	2	3	5
Total	264	336	454	580	865

Source: 1995-1999 Ad data

Notes: Includes classified advertising and agency commission, excludes production costs.
After discounts.

CHAPTER THREE



QUICK REFERENCE

QUICK REFERENCE

VAT RATES

Country	Sales (%)	Advertising (%)	Newsprint (%)	New equipment (%)	Outside composition (%)	Normal VAT rates (%)
Argentina	0	21	21	21	21	21
Austria	10	20	20	20	20	20
Australia	10	10	10	10	10	10
Azerbaijan	0	0	0	0	0	0
Belgium	0	21	21	21	21	21
Brazil	3	3	0	0	5	18
Bulgaria	20	20	20	20	20	20
Canada	7	7	7	7	7	7
Chile	19	19	19	19	19	19
China	13	0	17	17	0	17
Colombia	0	10	15	15	15	15
Costa Rica	0	13	0	13	13	13
Croatia	22	22	22	22	22	22
Cyprus	0	10	10	10	-	10
Czech Republic	5	5/22 (*)	22	22	22	22
Denmark	0	25	25	25	25	25
Estonia	0/18 (*)	18	18	18	18	18
Finland	22	0	0	0	0	22
France	2.1	19.6	19.6	19.6	5.5	19.6
Germany	7	16	16	16	16	16
Greece	4	18	18	18	4	18
Hungary	12	25	25	25	12	12/25 (*)
Iceland	14	24.5	24.5	24.5	24.5	24.5
Indonesia	10	10	10	10	10	10
Ireland	13.5	21	21	21	21	21
Israel	18	-	-	-	-	-
Italy	4	20	4	20	4	20
Japan	5	5	5	5	5	5
Korea, Republic of	0	10	10	10	10	10
Latvia	9	18	18	18	18	18
Lebanon	0	10	10	10	10	10
Luxembourg	3	12	15	15	12	15
Macedonia	5	18	18	18	18	18
Mali	0	18	0	18	0	-
Mexico	0	15	0	15	15	15
Moldova	0	20	0	0	0	20
Mongolia	0	0	0	0	0	0
Netherlands	6	19	19	19	19	19
New Zealand	12.5	12.5	12.5	12.5	12.5	12.5
Norway	0	24	24	24	24	24
Poland	7	7/22(*)	22	22	22	22
Portugal	19	5	19	5	19	-
Russia	10	10	18	18	18	18
Slovakia	14	20	14	20	20	14/20 (*)
Slovenia	8.5	20	20	20	0	20
South Africa	14	14	14	14	14	14
Spain	4	16	16	16	16	16
Sri Lanka	20	20	0	10	-	-
Sweden	6	25	25	25	25	25
Switzerland	2.4	7.6	7.6	7.6	7.6	7.6
Tanzania	0	20	20	20	20	20
Thailand	7	7	0 (*)	0 (*)	0	7
Turkey	1	18	8	0	0	18
Uganda	17	17	17	17	17	17
United Kingdom	0	17.5	17.5	17.5	17.5	17.5
United States of America	0	0	0	0	0	0

(*) see country report



OTHER TAXES

Country	on Advertising (%)	on Bill Posting (%)	on Profit (%)	Tax Concessions (%)
Argentina	0	0	30	(*)
Austria	5	0	34	0
Australia	0*	0	-	0
Azerbaijan	20	-	-	-
Belgium	0	0	34.2	-
Brazil	0	0	15-33 (*)	-
Bulgaria	0	0	0	0
Canada	(*)	-	-	-
Chile	19	-	16	-
China	5 (*)	-	33	-
Colombia	(*)	-	35	(*)
Costa Rica	-	-	30	-
Croatia	0	0	20	0
Cyprus	0	0	20-25 (*)	0
Czech Republic	0	0	29	0
Denmark	0	0	32	0
East Timor	-	-	30	-
Estonia	0	0	26 (*)	0
Finland	0	0	28	0
France	0	0	33.3	(*)
Germany	0	0	53	(*)
Greece	-	0	35	(*)
Hungary	1	0	18	0
Iceland	24.5	24.5	18	0
Ireland	0	0	12.5	(*)
Italy	(*)	(*)	35 (*)	(*)
Japan	0	0	30	0
Latvia	0	0	19	-
Lebanon	10	0	10	-
Luxembourg	0	0	30	-
Malaysia	5	0	28	0
Mali	-	-	25	-
Mexico	15	15	35	0
Moldova	0	0	22	0
Mongolia	0	0	15-40 (*)	-
Netherlands	19	19	30-34.5 (*)	0
New Zealand	12.5	-	33	-
Norway	0	0	(*)	0
Poland	-	-	28	-
Portugal	0	0	37.4	-
Russia	5 (*)	0	24	(*)
Slovakia	0	0	25	(*)
Slovenia	0	-	25	-
South Africa	0	0	30	0
Spain	0	0	35	0
Sweden	4-11 (*)	0	28	0
Taiwan	5	-	-	-
United Kingdom	0	0	10-30 (*)	0

(*)see country report



OWNERSHIP

Regulations on:

	Ownership registration	Foreign ownership	Cross media ownership	Capital Structure	Concentration	Concentration regulations planned?
Argentina	No	No	No	No (*)	No	No
Austria	No	No	Yes (*)	Yes	Yes	No
Australia	Yes (*)	Yes (*)	Yes (*)	Yes (*)	-	-
Azerbaijan	-	-	No	-	-	-
Belgium	No	No	No(*)	No	Yes	No
Brazil	Yes	Yes (*)	(*)	Yes (*)	Yes (*)	No
Bulgaria	-	-	-	-	-	Yes
Canada	Yes	Yes (*)	No	No	No	No
Chile	No	No	No	No	No	No
China	No	No (*)	No (*)	No	No	No
Colombia	No	No	No	No	No	No
Costa Rica	No	No	No	Yes	Yes	No
Croatia	Yes	No	Yes	No	Yes	Yes
Czech Republic	Yes	No	No	No	Yes	No
Denmark	No	No	No	No	No	No
Estonia	No	No	Yes	No	No	No
Finland	No	No	No	No	No	No
France	Yes	Yes	Yes	Yes	Yes	No
Germany	(*)	No	Yes	(*)	Yes	Yes
Greece	Yes	No	No	Yes	Yes	No
Hungary	No	No	Yes	No	No	No
Iceland	No	Yes (*)	No	No	No	No
India	-	Yes	-	-	-	-
Ireland	No	No	No	Yes	(*)	No
Italy	Yes	Yes (*)	Yes	Yes	(*)	Yes
Japan	Yes (*)	No	Yes (*)	Yes (*)	No (*)	No
Kenya	Yes	Yes	No	No	No	Yes
Latvia	-	-	No	-	No	No
Lebanon	Yes	Yes	No	Yes	No	No
Luxembourg	No	No	Yes	No	No	No
Macedonia	No	No	Yes	No	No	No
Mali	-	Yes	No	Yes	No	No
Mexico	No	Yes	No	No	No	No
Moldova	No	Yes	No	No	No	No
Mongolia	(*)	No	No	No	No	No
Netherlands	Yes	No	No	Yes	Yes	(*)
New Zealand	No	No	No	Yes	Yes	No
Norway	Yes	No	Yes	Yes	Yes	No
Peru	-	-	Yes	-	Yes	-
Poland	No	No	No	Yes	Yes	Yes
Portugal	No	Yes	No	No	No	No
Russia	Yes	No	No	(*)	No	Yes
Singapore	Yes	No	No	-	-	-
Slovakia	No	No	No	No	No	-
Slovenia	Yes	Yes	Yes	Yes	Yes	No
South Africa	No	(*)	Yes	Yes	No	Yes
Spain	No	(*)	No	No	No	No
Sri Lanka	Yes	No	No	Yes	No	No
Sweden	No	No	Yes	Yes	No	(*)
Switzerland	Yes	No	No (*)	Yes	Yes	No
Taiwan	No	No	No	No	No	No
Tanzania	Yes	(*)	No	Yes	(*)	No
Thailand	Yes	Yes	No	Yes	No	No
Turkey	No (*)	No	Yes	Yes (*)	No	No
Uganda	Yes	No	-	No	No	No
United Kingdom	Yes	No	Yes	Yes	Yes	No
United States of America	No	No	Yes	No	Yes	Yes

(*) see country report



TRANSPORT & TELECOMMUNICATIONS

Tariff Reductions

Country	Postal Rates (%)	Railroad Rates (%)	Telephone (%)	Telegraph (%)	Telex (%)	Other (%)
Argentina	0	0	0	0	0	0
Austria	0	0	0	0	0	0
Australia	0	0	0	0	0	0
Belgium	(*)	100(*)	50	0	0	0
Brazil	0	0	0	0	0	0
Bulgaria	0	0	0	0	0	0
Canada	0	0	0	0	0	0
Chile	0	0	0	0	0	0
China	0	0	0	0	0	0
Colombia	0	0	0	0	0	0
Costa Rica	0	0	0	0	0	0
Croatia	0	0	0	0	0	0
Cyprus	50	0	50	50	50	0
Czech Republic	20-30	0	0	0	0	0
Denmark	(*)	0	0	0	0	0
Estonia	(*)	0	0	0	0	0
Finland	0	0	0	0	0	0
France	50	70	0	0	50	(*)
Greece	(*)	0	(*)	50	50	0
Iceland	50 (*)	-	0	0	0	0
Indonesia	0	0	0	0	0	(*)
Ireland	0	0	0	0	0	0
Italy	35-45 (*)	0	50	0	0	0
Japan	-	0	0	0	0	0
Latvia	0	0	0	0	0	0
Lebanon	2	0	50	0	0	0
Luxembourg	(*)	0	0	0	0	0
Macedonia	0	0	0	0	0	0
Malaysia	0	0	0	0	0	0
Mali	0	0	0	0	0	0
Mexico	0	0	0	0	0	0
Moldova	0	0	0	0	0	0
Mongolia	0	0	0	0	0	0
Netherlands	0	0	0	0	0	0
New Zealand	0	0	0	0	0	0
Norway	0	0	0	0	0	0
Poland	0	0	0	0	0	0
Portugal	55-60	0	0	0	0	0
Russia	0	0	0	0	0	0
Slovakia	0	0	0	0	0	0
Spain	25-50	0	0	0	0	0
Sri Lanka	0	0	0	0	0	0
Sweden	0	0	0	0	0	0
Switzerland	15-30	0	0	0	0	0
Thailand	0	0	0	0	0	0
Turkey	0	0	0	0	0	0
Uganda	0	0	0	0	0	0
United Kingdom	0	0	0	0	0	0
United States of America	0	0	0	0	0	0

(*) see country reports



TOTAL AMOUNT OF DIRECT SUBSIDIES

Country	1999	2000	2001	2002	2003	(US\$ million)	% change current prices
						2003 *	1999/2003
Austria (Euro million)	19.2	15.5	13.4	13.5	12.9	12.1	-33.08
Belgium (Euro million)	1.4	1.4	1.4	-	1.1	1.0	-25.69
Denmark (Krone million)	11	14	-	9	14	1.8	27.27
Estonia (Kroon million)	26	26	26	26.0	28.0	1.7	7.28
Finland (Euro million)	12	-	-	-	-	11.3	-100.00
France (Euro million)	62.5	64.6	63.4	67.2	63.6	59.8	1.76
Italy (Euro million)	57	57	57	94	94	88.4	64.91
Luxembourg (Euro million)	-	-	-	-	5.5	5.2	-
Macedonia (Dinar million)	-	-	-	-	56.0	0.9	-
Mali (CFA Franc million)	75	-	-	-	-	0.1	-
Moldova (Euro million)	-	-	-	12.9	12.9	12.1	-
Norway (Krone million)	159	164	180	-	-	22.5	-
Portugal (Euro million)	0.7	1.3	0.8	1.2	1.6	0.7	114.98
Russia (Rouble million)	208	208	270	224	170	5.8	-18.27
Sweden (Krona million)	527	539	496	486	509	52.3	-3.4

* or latest available figure

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