

## Brazilian media system in template

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### 1. Socio-political context

Country Population	207.681 million (according to IMF, 2017)
Major industrial sectors	Brazil has a diversified economy driven mainly by services, industrial production and exportation of goods. aircraft, steel, iron ore, coal, machines, weaponry, textiles and clothing, petroleum, cement, chemicals, fertilizers, consumer products (including footwear, toys and electronics), food processing, transport equipment (including cars, railway vehicles and locomotives, ships and aircraft); electronic products; telecommunications equipment, satellites, real estate, tourism.
Rate of economic growth	After a period of accumulated growth between 2001 and 2014, the economy dropped by 3.8% in 2015 and 3.6% in 2016 (IMF DataMapper).
Main political parties	Brazil has a multiparty system Political system fragmented: 28 political parties in the Congress (35 in total), mainly: Workers' Party (PT), the Brazilian Democratic Movement Party (PMDB), the Brazilian Social Democracy Party (PSDB), Democratic Labour Party (PDT), Brazilian Labour Party (PTB), Party of the Republic (PR), Brazilian Socialist Party (PSB), and the Democrats (DEM).
Main religions	According official data from IBGE (2010), the twenty-first century has seen an increase in the number of Protestant church members (at least 22% of Brazilians), a decrease in the number of Catholics (64% of the population), Traditional/Mainline Protestant (4.03%), Assemblies of God (6.46%), Christian Congregation of Brazil (1.20%), Other Pentecostal (5.64%), Other Christian (6.82%), Spiritism (2.02%), Other religions (1.04%), No religion (8.04%), Unknown (0.12%)
Main languages	Portuguese is the official language in Brazil
Literacy rate	92% (according to PNAD, IBGE, 2016)
Telephones (fixed, mobile) per 1 000	200 (Anatel, April 2017) / 1167,30 (Anatel, May 2017)

### 2. Media structure

#### 2.1 Major indicators

Newspapers (dailies, weeklies)	Brazil has 5,219 newspapers, 784 of which are daily. (In 2014)
Magazines	In 2012, 5,913 magazines titles were published in Brazil.

Books	In 2016: the Brazilian publishing sector produced 51,819 titles, 427.2 million copies and sold 385.1 million copies. In 2015: 52,427 titles. 446,848,571 copies produced. In 2014: 60,829 titles. Exemplary Produced Total: 501,371,513. In 2013: Titles 62.235. Exemplary Produced Total: 467,835,900.
Radio	In 2013, 4,619 commercial FM radio stations, 466 educational radios and 4,504 community radio stations, making a total of 9,589 radio stations.
Television (terrestrial on-air broadcasters, cables, satellite)	In 2013, 517 broadcasters, 317 commercial and 204 educational.
Film	In 2012, approximately 83 Brazilian films were released in theaters. In 2013, 129 films. In 2014, 114 films. In 2015, 132 films. In 2016, 142 films. Brazil classifies feature films into two types, long and medium. In 2012, 202 feature films named long were recorded. In 2013, 266 films. In 2014, 327 films. In 2015, 278 films. In 2016, 328 films. In 2012, 282 feature films named medium were recorded. In 2013, 516 films. In 2014, 574 films. In 2015, 592 films. In 2016, 558 films. short films: In 2012, 402 films. In 2013, 570 films. In 2014, 642 films. In 2015, 647 films. In 2016, 543 films.
Online media	-
News agencies	-

## 2.2 Advertising market

According to the Brazilian Media Research (Pesquisa Brasileira de Mídia, Presidency of Republic, 2016), officially the TV remains as the main source of information, mentioned as the first mention as source by 63% of the population. The second preferred is the internet 26% and the third is the Radio 7%. TV signal is present in almost all Brazilian territory (more than 95% of the country), but just only 10.9% of the municipalities have television generators. In other words, the TV production is concentrated in main cities like Rio de Janeiro, Sao Paulo, and Brasilia.

The data below, from the then Ministry of Communication, shows the share of each type of television broadcasting service and the percentage of commercial broadcasters.

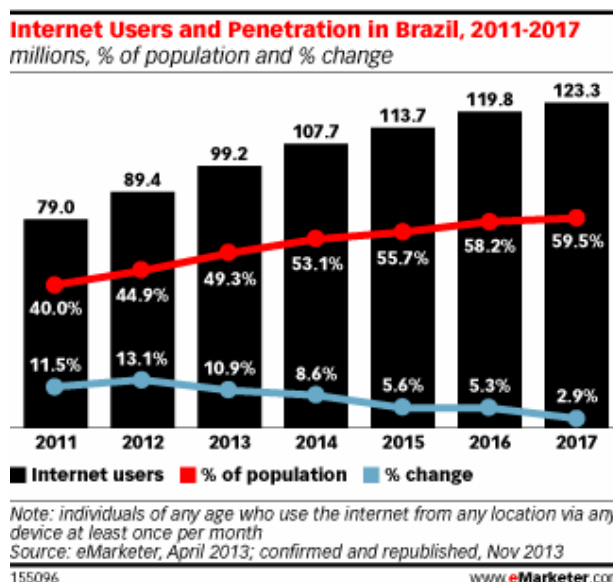
	Commercial	Educational	Community	Total	% Commercial
<b>TV (broadcaster)</b>	299	164	-	463	71.4
<b>TV (rebroadcaster)</b>	6293	-	-	6293	100
<b>FM station</b>	2125	422	4653	7200	29.5
<b>Other radio (medium, short and tropical waves)</b>	1817	-	-	1817	100
<b>Total</b>	10534	586	4653	15773	66.8

(Ministry of Communications, 2014)

Below, a table (with data of the then Ministry of Communications in 2014) shows the main presence of Commercial profile in the TV stations with more than 66.8% of the 15.773 TV stations in Brazil.

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The increasing number of Brazilian people using Internet daily has changed the media system and access to media, specially less older people. For instance, 77% of youngsters (15-17 years) use internet daily.



The Community Communication initiatives have difficult to exist since the creation of the channels to have conditions for working. About community radio licenses for example, the Ministry of Science, Technology, Innovations and Communications, there were 4,300 authorized community radio stations in Brazil as of 2011.<sup>1</sup> In 2014, this number would be updated to 4,724, according to a news report<sup>2</sup>.

### 2.3 Major media companies

The seven major networks are: Globo, Record, SBT, Bandeirantes, RedeTV!, EBC (a public network) and CNT.

<sup>1</sup> That means that the broadcasters meet the legal requirements, including: being under the responsibility of official community associations; broadcasting in modulated frequency (FM), having low power transmitters (25 Watts) and having coverage restricted to a 1-kilometre radius around the antenna (as determined by Law 9612/1998 and Decree 2615).

<sup>2</sup> <http://www.cartacapital.com.br/sociedade/radios-comunitarias-eterna-luta-contra-a-burocracia-e-a-justica> (in Portuguese)

According to a BBC (British Broadcasting Corporation) survey, the media market in Brazil is dominated largely by a small group of families and politicians.

In the television industry, three of them are of greater importance: the Marinho family (the owner of Rede Globo, which owns 38.7% of the market), Bishop of the Universal Church of the Kingdom of God Edir Macedo (largest shareholder of Rede Record, 16,2% of the market) and Silvio Santos (owner of SBT, 13.4% of the market).

The Marinho family also owns radio stations, newspapers and magazines - field in which it competes with Roberto Civita, who controls Abril Group (both hold about 60% of the publishing market).

Families that control the main Brazilian newspapers: the Frias, owners of Folha de S.Paulo, and the Mesquita, from O Estado de S. Paulo (both among the five largest newspapers in the country). In Rio Grande do Sul, the Sirotsky family owns the RBS group, which controls the newspaper Zero Hora, as well as TVs, radios and other regional newspapers.

Families linked to traditional politicians are in charge of media groups in different regions, such as the Magalhães in Bahia, the Sarney in Maranhão, and the Collor de Mello in Alagoas.

### 2.3.1 Top - Five main television networks

**Table – Number of media outlet associated with the five main television networks**

Network	TV	FM	SW	MW	OT	CTV	MMD S	ST V	Newspaper	Magazine	CR	TOTAL
<b>Globo</b>	105	76	11	52	4	9	2	17	33	27	1	340
<b>SBT</b>	58	70	1	39	2	1	10		12		1	195
<b>Band</b>	39	48	5	44	3	13	1	2	11			166
<b>Record</b>	46	51	2	31	3				9			142
<b>Rede TV</b>	26	33		17	2	1	1		4			84

TV = Television / FM = FM radio / SW = Short Wave radio / MW = Medium Wave radio / CTV = Community TV / MMDS = Multichannel multipoint distribution service / CR = Community radio  
Source: Media Owners Project (Donos da Mídia). Data from the Ministry of Communications and Anatel (2008).

**Table – Audience share during prime time by the five main television networks in 2015**

Network	Share of television sets switched on (%)
Globo	36.9
SBT	14.9
Record	14.6
Band	4.3
RedeTV	1.4
Others	28

Total of the population, from 6pm – 12am.  
Source: Mídia Dados 2015 – Grupo de Mídia de SP.<sup>3</sup>

### **3. Media Regulation**

#### **3.1 Legislation**

The Constitution of 1988 supports the freedoms of expression and of the press, The right of Access to Information, Privacy, Freedom of Religion, Belief and Opinion, Promotion of Access to Information in line with international standards. Freedom of expression is defined in Article 5, Chapter I, covering individual and collective rights and duties in terms of: *expression of thought ( is free); the right of reply, as well as compensation for property or moral damages or for damages to the image; freedom of conscience and of belief (the free exercise of religious); the expression of intellectual, artistic, scientific, and communications activities is free; the privacy, private life, honor and image of persons are inviolable; the practice of any work, trade or profession is free, observing the professional qualifications which the law shall establish; access to information is ensured to everyone and the confidentiality of the source shall be safeguarded, whenever necessary to the professional activity.*

*Freedom of expression and freedom of press are also mentioned under Article 220 (Paragraphs 1° and 2°) which contains six Paragraphs in the social communications chapter.*

*Paragraph 3° also reinforces that the competence of federal laws is also to regulate public entertainment and shows. And establish legal means which afford persons and families the possibility of defending themselves against radio and television programs and schedules which go contrary to the provisions of article 221, as well as against publicity of products, practices and services which may be harmful to health or to the environment.*

*Paragraph 4° concerns about legal restrictions in advertisings. Paragraph 5° - Social communication media may not, directly or indirectly, be subject to monopoly or oligopoly. And Paragraph 6° - The publication of a printed social communication medium shall not depend on license from authorities.*

#### **3.2 Agencies in charge of the Legal Regulation**

The communication service in Brazil is a public service provided by private companies. Since television broadcasters in the country are public concessions, it is the Ministry of Communications' role to supervise the content to comply with the laws of the sector in the country. With the lack of regulation of the laws that deal with communication in the country and the regulation of articles that deal with the subject in the Constitution, the judiciary has been activated to resolve cases of violation of rights committed by these means.

#### **3.3 New Media Regulation**

Beyond the Constitution, at same time there are relevant laws related to Broadcasting, Internet and another media activities, it needs not just to create some norms in dialogue with Constitutional principles and to create conditions for the effectiveness of these norms.

*The Brazilian Code of Telecommunications, Law 4117/1962, remain to rules over broadcasting. The Internet is regulated by The Civil Framework for the Internet (Law 12.965/2014).*

In relation to the *Right of Reply*, the National Congress approved and the President Dilma signed the Law 13.188/2015.

*The Law on Access to Information (12.527/11) determined access as the rule and restrictions as exception, defining a maximum time of 50 years to keep a file in secret.*

*The Civil Code* (Article 953) determined compensation for injury, defamation or slander for damages suffered by offended parties.

In 1988, The Brazilian Constitution established a complementary broadcasting with state, private and public system. Just 20 years afterwards, The Congress representative approved and the president sanctioned the Law 11,652 that defined *the base of the Brazilian Media Public Service*. In the President Temer period, this norm changed and, currently, the President of the Republic defined according to his will the president of the Brazilian Company for Public Service of Media and there no longer the Curator's Council.

The Law 12.485/2011 forbids or limits cross-ownership of mass media only concerns subscription television channels. Therefore, there is no restriction on cross-ownership in other types of media, such as terrestrial television, radio or print news.

### **3.4 Self-Regulation Mechanisms**

Speaking about media self-regulation, even though the companies maintain internal codes of ethics and journalistic practice, there are few self-regulation and media accountability mechanisms implemented in the field of communication. One example about that, the main national media and communication companies do not have ombudsmen capable of dealing with allegations and complaints from the public about ethical violations within media outlets. There are only Public TV and Radios and two newspapers who act as ombudsmen (as compared to eight in the 1990s).

One exception in terms of self-regulation is an advertising experience. The advertising sector created in 1978 the National Council for Advertisement Self-Regulation (CONAR). Its activities are based on the Code of Advertising Self-Regulation. The missions of CONAR are "to prevent false or abusive advertising that embarrasses consumers or companies", "to answer complaints by consumers, authorities or associates" receiving and analyzing complaints against mistakes and/or abuses of advertising.

## **4. Global and regional dimensions**

### **4.1 Global presence of national media content**

ANCINE (National Film Agency) has three programs to support the export of Brazilian media content recorded on its website: Cinema do Brasil (Cinema of Brazil), Brazilian Tv Producers and Film Brazil. No records were found on the amount of national media material exported.

### **4.2 Economic presence/ownership of national media in markets abroad**

From Brazil to outside, it is important to mention the role of Globo exporting telenovelas and the Record's TV international experience. This channel operates mainly in countries that the Universal Church of God is present.

### **4.3 Foreign ownership and content in national media**

International players are more present in telecommunication and Pay TV sectors than Journalistic companies. There are some reasons for that. First of all, a legal relief because the Brazilian constitution just allow 30% of journalistic companies under control of strangers. Beyond it, an economic and political reason. The relevant internal media market was structured with Brazilian enterprises and a high number of media companies have owners or controllers involved direct or indirectly in political activities to inside.

## 5. Journalistic Community

*Estimate:* According to the registered relations, provided by the Ministry of Labor and Employment (Ministério do Trabalho e Emprego - MTE), in December of 2011 there were about 145 thousand registered journalists in Brazil (a significant number of journalists working outside the newsroom as Press Advisers). According to a research of 2012 about the profile of the Brazilian journalist, Brazilian journalists were mostly white (72%), women (64%), single, up to 30 years old (48%).

In research, 45.8% worked exclusively in the media; 33.6% worked exclusively outside the media (press office or communication or other actions that use journalistic knowledge); 12.2% worked at the same time in functions in the media and outside the media; 4.4% worked as teachers and in functions in the media or outside the media; 4% were exclusively teachers. In relation to journalists who work in the media: 39% were registered, 6% freelancer, 14% service provider, 5% Legal entity.

*Unions:* Professional Journalists' Federation (FENAJ) with regional union in each Brazilian state; Professional's Radio Federation with regional union in each Brazilian state. The ownership of media companies has relevant organizations like Brazilian Association of Radio and TV stations (ABERT, as a Federation of the state's entrepreneurs Unions), Newspapers National Association (ANJ), Magazines National Association (ANER), and Brazilian Association of Pay TV (ABTA)

## 6. Trends and issues under debate in 2010s

In Brazil, keeping the last years pattern, television remains the most regularly used medium, but step by step is increasing the number of internet users, specially thorough cell phone connection. In this aspect, it is important to follow the changes in the internet users habits especially in terms of Social Media impacts because Brazil has a huge number of Facebook (102 million users, almost the 50% of the population) and Whatsapp users (120 million users, almost 60% of the population). So, over-the-air television still dominates in terms of perceived importance, audience size and advertising expenditures, but it is losing audience last years.

Other important aspect to follow is the effects of this internet decrease in terms of Concentration of ownership. In other words, the internet use's growth expand, does not change or reduced the Concentration of the Media Ownership and/or the audience. It is an important matter in a country characterized for a reduced Communication Policies initiatives.

Internet access is rapidly increasing getting more public and advertising. Some internet access policies were intensified in this Century (National Broadband Program, for example) trying to expand the connection. Therefore, the number of people without access keeps relevant and, beyond to offer an internet service via fixed or mobile connection, it is important to assure the internet quality ensuring the continued delivery of the nominal speed.

Finally, and not least, two points remark the Brazilian Media System and they also are present in the current decade agenda. The Media and accountability experiences remain underdeveloped. Maybe, the internet increase can promote more contact with media producers and the public members and this dialogue contributes with more fair and precise contents.

Moreover, with the current national economic and political crises and the effects of communication's ecosystem changes, a significant number of communication professionals are working outside media companies. For example, a considerable number of journalists ("bachelors") are working outside newsrooms in communication/media public relations and press adviser initiatives. With this kind of changes, how will media and journalism sustain in the next years?

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