



CHAPTER

14 Media Ownership and Concentration in Switzerland

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Abstract

This chapter examines media ownership and concentration in Switzerland. Following an overview of the Swiss media landscape, including major debates in Switzerland concerning changes in regulation, the remainder of the chapter focuses on print media (newspapers, book publishing, magazine publishing), audiovisual media (radio, television, film), telecommunications media (wireline and wireless telecom), and Internet media (Internet Service Providers, search engines, online news market). Concentration is relatively moderate in Switzerland. While concentration indices appear to be quite high for some industries, the Swiss market is small compared to other European markets. There is a good amount of cross-border inflow of media from adjoining countries, which adds to the media diversity in a country divided by three major language groups. Unusual for present Europe, the telecom incumbent, Swisscom, is state-owned, with other participation by TDC, Liberty Global, and Orange. In cable TV, Liberty Media is dominant; in audiovisual media, the public SRG/SSR, plus German and French broadcasters; and in print media, Ringier, Tamedia, and Axel Springer.

Keywords: [Swiss media market](#), [ownership concentration](#), [media groups](#), [print media](#), [audiovisual media](#), [telecommunications](#), [Internet](#), [Ringier](#), [Tamedia](#), [Springer](#), [Orange](#), [TDC](#), [SRG/SSR](#), [Liberty Global](#), [Swisscom](#)

Subject: [Economic Sociology](#), [Social Research and Statistics](#)

Introduction

The Swiss media landscape reflects Switzerland's society. Switzerland is a multilingual and multicultural society with four official languages—German, French, Italian, and Romansch—and about 22% of the population are not Swiss citizens. In consequence, the main broadcaster SRG SSR offers three German-speaking TV channels, two French-speaking TV channels, and two Italian-speaking TV channels, as well as some broadcast programs in the Romansch language. Moreover, many foreign TV channels are accessible in most Swiss regions in their respective languages. As has been observed, Switzerland is characterized by a high penetration of all the types of media, while “on the other hand, the time of use of the media remains moderate.”¹

There are major debates in Switzerland concerning changes in regulation. The public monopoly over radio and TV broadcasting was abolished in the 1980s, but many questions remain regarding the direction that SRG SSR (the main audiovisual group, which is now a non-profit-making association with a public remit) should take and the means to develop commercial broadcasting. Telecom regulation in Switzerland was modified very late compared to other European countries: the telecom market was opened to competition only in 1998 by the Telecommunication Law of April 30, 1997, and there are calls for further revision of that law (which was last revised in 2006).

The print press also faces new challenges: in Switzerland the press benefits from preferential postal prices for local and regional newspapers, and from a reduced VAT rate for print publications. This assistance was estimated at US\$98.2 million (66.8 million euros) in 2008, which is far less than in other European countries: for example, for 2008 the total amount was estimated to be equal to US\$1.9 billion (1.3 billion euros) in France and US\$1.8 billion (1.2 billion euros) in Italy.² The debate about the role of the state emerged because of the ongoing economic deterioration of the paid-subscription newspapers sector.

And although there are some debates over concentration, media concentration is not considered by many stakeholders to be a major issue in Switzerland: the Federal Council in 2010 rejected further regulation, saying that the sector was sufficiently self-regulated.³ Moreover, concentration is correlated with the market size: as Switzerland is a small country, high concentration indices should be expected. We will observe that, in general, concentration is relatively low, especially if we take into account this important specificity.

Print Media

Print media is seen as a key pillar of Swiss democracy. Having a wide variety of newspapers has long been viewed as part of political pluralism in such a small country with four official languages. According to the media monitor REMP:

Switzerland is a press country. The only media database of the Association of Swiss Advertising Companies (ASSP) takes into account 436 newspapers, in the daily, regional weekly and Sunday press category. 347 titles, respectively 79.6%, are published in German, seventy-four (17%) are published in French and thirteen (3%) are written in Italian. Two titles (0.5%) are published in Romansch. This unique supply, in international comparison, is complemented by more than 2,333 general public, financial, economic, thematic and specialized press products.⁴

This can mainly be explained by the high level of print readership in Switzerland: in 2009, REMP reported that 92.4% of the adult Swiss population (14 years and up) regularly read newspapers, and 91.6% regularly read magazines. Switzerland has a high per capita print circulation for newspapers: there were 14 paid-subscription daily newspaper titles per one million inhabitants in 2008, twice as high as the figures for the United States, Germany, France, and Italy.⁵

In the past two decades, a trend for greater concentration has been observed at the ownership level. A few big publishing houses own most of Swiss print titles: Ringier, Tamedia, and NZZ (Neuen Zürcher Zeitung) Medien Gruppe. Nevertheless, there are still a large number of print titles and, from an editorial point of view, a diversity of opinions. That said, “content diversity is not insured by the multiplicity of titles,” since several of the smaller newspapers mainly reproduce news agencies’ content, and there are editorial collaborations at the national level.⁶ On the other hand, various titles belonging to the same company correspond to specific contents for selected audiences.

Newspapers

We focus here the analysis only on daily newspapers. The number of paid-content newspapers that are published at least four times a week in Switzerland declined by 40% between 1985 and 2006, falling from 124 to 76 titles.⁷ At first, this decline was associated with an increase in the circulation of the existing titles: the average circulation of a Swiss daily newspaper was about 10,000 copies in 1985 and 16,000 in 2006. But with the emergence of free dailies since 2000 the situation has deteriorated for paid-content newspapers. Only the Sunday paid-content press has further developed. Concentration will be estimated hereafter only for daily newspapers, Sunday newspapers being excluded.

Tamedia’s expanded market share is linked in particular to the development of the free newspapers *20 Minuten* (German) and *20 Minutes* (French) and to various acquisitions: Tamedia bought a 80% share of the Espace Media Group in 2007, it took the control of Zürichsee Presse AG and Zürcher Unterland Medien AG in 2010, and there was the merger between Tamedia and Edipresse (merging their Swiss businesses), which was completed in 2011. The increase in Ringier’s market share since 2008 is due to the publication of the free daily *Blick am Abend*. The increased market share of Edipresse in 2008 is correlated with the free newspaper *Le Matin Bleu*, which was published for about a year after October 2005. Concentration of media

ownership was very high in 2012 if we consider only the four first companies: the C4 ratio, which was around 55% in 2005, rose to 80% in 2012. The market share of Tamedia alone reached 44.3% in 2012. The HHI and the Noam Index increased as well since 2005: they more than doubled between 2005 and 2012, but in 2012 they stayed at a level that was not extremely high because many small companies were still present in the market in 2012 (Table 14.1).

Table 14-1. Daily Newspapers (Market Shares by Circulation)

	2005	2008	2012
Tamedia (Coninx Family)	26.1	35.5	44.3
Espace Media Groupe	7.9		
Edipresse	9.6	13.5	
Ringier (Ringier Family)	10.0	13.6	18.2
Neue Zürcher Zeitung (NZZ Medien Gruppe)	9.0	11.5	12.3
LZ Medien Gruppe ¹	4.6		
AZ Medien Gruppe	6.6	5.9	5.7
Südostschweiz Presse	4.9	3.7	4.1
Basler Zeitung (BZ Medien Gruppe)	3.4	2.7	2.3
Groupe St-Paul	2.3	1.9	2.2
Edition Suisse Holding (Philippe Hersant Group)	1.9	1.4	2.7
Groupe Rhône Media ²	1.5	1.3	
Zürichsee Medien ³	1.6	1.3	
Zürcher Oberland Medien	1.4	1.1	1.1
Gassman	1.4	1.1	1.1
Fondazione per il Corriere del Ticino	1.4	1.1	1.2
Ziegler Druck- und Verlags-	1.3	1.0	1.1
Giacomo Salvioni	1.2	0.9	1.1
Others	4.1	3.5	2.6
Total Revenue (mil CHF) ⁴	Ne *	1,865	1,460
Total Revenue (mil US\$)	Ne *	1,727	1,558
C4	54.6	74.0	80.5
HHI	1,137	1,824	2,520
N (>1%)	18	15	13
Noam Index	282	471	699

Source: Our calculations⁵ based on data from REMP <<http://www.remp.ch/>> for market shares.

* Ne: not evaluated.

1 NZZ Medien Group took a majority of the capital in LZ Medien Gruppe in 2007.

2 In 2010 Edition Suisse Holding (Philippe Hersant Group) took a majority of the capital in Rhône Media, which owns the daily *Le Nouvelliste*.

3 In 2010 Tamedia took the control of Zürichsee Presse AG, which was previously controlled by Zürichsee Medien AG.

4 To estimate the value of the market here, we added the advertising revenues (source: Fondation Statistique Suisse en Publicité) and the national “budget,” estimated for the population in the country (source: Schweizer Medien).

5 To calculate the market shares, circulation data for all the companies (source: REMP; sold copies for paid-content newspapers titles) are taken into account, Sunday newspapers being excluded; when a company owns the majority of a publisher’s capital, the market share is based on the total circulation of the title. To calculate the HHI and the Noam Index,

Concentration in daily newspapers ownership has increased in recent years. The concentration indices are likely to increase further since 2012, because of the economic situation of the daily press. The recent increase in concentration is explained by three correlated main trends: the strong development of free dailies, a decline in advertising revenues,⁸ and some important mergers. Tamedia is now the leading publisher of newspapers: the 2011 Tamedia-Edipresse Suisse merger gave birth to a big Swiss publishing conglomerate with an annual turnover of about US\$1.2 billion (CHF1.1 billion). It publishes the free daily newspapers *20 Minuten/20 Minutes*—with a print circulation of 700,000 copies in 2011—and 12 paid-content daily newspapers, which also circulate approximately 700,000 copies nationally. Ringier is the second-leading publisher of daily newspapers: it owns the daily tabloid newspaper *Blick*, the free evening sheet *Blick am Abend*, and the leading Sunday edition, *Sonntagsblick*. NZZ Medien Gruppe is an important group mainly in the German-language market of Switzerland. Of course, in such a small country as Switzerland, increasing ownership concentration is inescapable because economic constraints and the growth of online media services have drastically changed the press landscape. But as already stated, the number of titles per capita remains exceptionally high in comparison with other European countries.

Book Publishing

The Swiss book market is small compared to the press market: the press “budget” of the population was US\$1.5 billion (CHF1.9 billion) in 2004, US\$1.7 billion (CHF1.8 billion) in 2008, and US\$1.6 billion (CHF1.7 billion) in 2010.⁹ In contrast, the book “budget” for the Swiss population was US\$585 million (CHF722 million) ↵

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in 2004, US\$567 million (CHF910 million) in 2008, and US\$843 million (CHF878 million) in 2010.¹⁰

It has not been possible to collect separate data specifically for book publishing in Switzerland, so we can only speak in generalities. First, there are three markets because of the three main languages (Romansch is not widely spoken enough to factor in here). Second, foreign publishing companies dominate the market: it is generally estimated that 80% or 90% of the books circulating in the French-language market are imported from France. The French group Lagardère was present in distribution and bookselling until 2012–2014, but withdrew from these Swiss activities by selling the companies Office du livre de Fribourg (OLF) and Diffulivre, which are the main distribution companies in the French-speaking parts of Switzerland, and the booksellers Payot and Naville.¹¹

Swiss publishing companies sell nearly 80% of the books they produce in neighboring countries. In 2008, there were 406 Swiss publishing houses, of which 278 were in German, 121 in French, and seven in Italian.¹² In the German-language market, the publishing houses that play a significant role are the subsidiaries of publishers in Germany, with the exception of Diogenes, Switzerland’s biggest independent book publisher.¹³

Between 1998 and 2008, the number of the Swiss publishing houses fell by 20%. The number of bookshops also decreased, from 633 in 1998 to 580 in 2008. The distribution market is highly concentrated in French-speaking Switzerland and has led to high prices, as the four main companies—Office du livre de Fribourg (OLF), Interforum Suisse SA, Diffulivre SA, and Servidis SA—“decide the prices of books sold to bookshops.”¹⁴ The Planeta Group (Spain) is the owner of Editis, the French publishing group that runs Interforum. Servidis belongs to Slatkine, a Geneva publishing house, and to the Editions du Seuil (France). In the German-language market of Switzerland, most of the books come from either Germany or Austria; booksellers sometimes order books directly from German or Austrian publishing houses.

There are debates about statistics concerning the book industry in Switzerland. A study by the University of Zürich gave numbers based on different sources. It indicated that the book publishing industry was worth US\$785 million (CHF974 million) in 2004, whereas in 1996 it had been worth US\$810 million (CHF1 billion).¹⁵ The same study estimated that the overall turnover of all publishing houses in Switzerland in 2004 stood at US\$890 million (CHF1.1 billion) and that the overall turnover at the reduced VAT rate for books was US\$317 million (CHF393 million) in 2004.^{16 17}

Let us note a debate concerning the regulation of book prices: a regulation in favor of a uniform retail price (a regulation comparable to the French one) was rejected by a popular national referendum that took place in March 2012.

p. 363 **Magazine Publishing**

Here we discuss the *presse grand public*, which does not include regional weekly newspapers, trade journals, or specialized magazines. Market share calculations for magazines include only Swiss consumer magazines and not foreign offerings available in-country.¹⁸ Though many foreign magazines are available on the Swiss market, there is no available data on their circulation. So concentration indices for Swiss magazines should be interpreted in terms of competition among Swiss publishers only. In 2005 and 2008, the C4 ratio was around 75–77% and it reached 87% in 2012, which is very high. The HHI was under 1,800 in 2005 and 2008, which was indicative of a moderately concentrated market, but it climbed to 2,200 in 2012. Concentration has increased, and the sector is now dominated by Ringier, Axel Springer, and Tamedia. Ringier was the market leader for many years, but it is now in competition with Axel Springer and Tamedia (Table 14.2).

Table 14-2. Magazine Publishing (Market Shares by Circulation)

(A)	2005	2008	2012
Ringier (Ringier Family)	27.8	23.0	26.9
Axel Springer Suisse (Germany)	1.7	26.8	29.2
Jean Frey ¹	18.2		
Tamedia (Coninx Family)	10.2	9.0	23.7
Edipresse	19.6	18.9	
NZZ Medien Gruppe	6.2	6.4	7.4
Reader's Digest (US)	5.4	5.2	4.2
CT Cinetrade AG	2.1	2.2	3.0
Teleradio 7	2.7	2.8	2.6
Weltwoche Verlag (Roger Köppel) ²		2.7	2.6
Editions Plus	2.5	1.2	Data not available
Others	3.5	1.8	0.3
Total Revenue (mil CHF) ³	Ne [*]	475 E	581 E
Total Revenue (mil US\$)	Ne [*]	440 E	620 E
C4	75.8	77.7	87.2
HHI	1,683	1,775	2,232
N (>1%)	10	10	8
Noam Index	532	561	789

Source: Our calculations⁴ based on data from REMP <<http://www.remp.ch/>> for market shares.

* Ne: Not evaluated; E: estimate.

1 Jean Frey was purchased by Axel Springer in 2007.

2 Until 2006, the magazine *Die Weltwoche* was published by Jean Frey.

3 To estimate the value of the market here, we added the advertising revenues (source: Fondation Statistique Suisse en Publicité) and the national "budget," estimated for the population in the country (source: Schweizer Medien). Due to some statistical issues it is an estimate (E).

4 Only Swiss consumer magazines are taken into account. To calculate the market shares, circulation data (source: REMP) for all the companies are taken into account; when a company owns the majority of a publisher's capital, the market share is based on the total circulation of the title.

The Swiss audiovisual market is dominated by the broadcaster SRG SSR,¹⁹ which was founded in 1931. In 1991, SRG SSR was restructured as an association with four regional companies: SRG.D (broadcasted in German), RTSR (broadcast in French), Corsi (broadcast in Italian), and SRG.R association (broadcast in Romansch). The regional companies SRG.D and RTSR are each made up of seven member companies. This structure ensures the involvement of many listeners and viewers in each Swiss region. SRG SSR is financed mainly by license fees (accounting for 70%–75% of its income). For a long time SRG SSR was a monopoly, but in 1983 local private and commercial radio channels were authorized. Now private local radio and television companies in Switzerland are entitled to 4% of license fees annually. The revised Federal Radio and Television Act (RTVA), adopted by parliament in 2006 and in force since April 2007, not only has ensured a continued strong public service from the SRG SSR, but also has strengthened commercial radio and television broadcasters. Concerning SRG SSR a convergence process was launched in 2009: now radio and television are amalgamated in each language region.

To analyze concentration in audiovisual media industries, we consider the three main linguistic regions in Switzerland separately. Although SRG SSR is the major Swiss operator in radio and television with 18 radio stations and 7 TV channels, Swiss consumers have access to many European and international channels.

Radio

The market share of SRG SSR diminished after the end of the public monopoly in the 1980s, but in the past decade, it has grown in all three of Switzerland's language markets, and it is now particularly large in the Italian-language market. The market shares for commercial Swiss radio broadcasters are small, as are the market shares for foreign stations (Table 14.3).

Table 14-3. Radio (Market Shares by Audience)¹

Swiss Language Markets (Radio)		2001	2004	2008	2012
German-Language Market	SRG SSR	62.8	65.5	68.2	65.4
	Public foreign stations	5.4	5	3.8	2.9
	ARD (Germany)	4.3	4.2	3.4	2.7
	ORF (public) (Austria)	1.1	0.8	0.4	0.2
	Private stations in Switzerland	23.1	22.4	23.8	26.2
	Sepp Trütsch (Eviva)	0.9	1.1	1.1	1.3
	Belcom AG (Radio 24)	2.9	2.9	2.9	3
	Ringier AG (Energy Zürich, EnergyBern)	3.7	3	2.8	3
	Schawinski Roger (Radio1)	-	-	0.9	1.2
	BT Holding AG (Argovia)	2.1	2.2	1.9	2.4
	LZ Medien Holding AG (Pilatus)	1.8	1.8	1.7	2
	Beelk Holding AG (Sunshine)	1	1.2	1	1
	Triner Hugo (Central)	1	1.2	1	1
	St Galler Tagblatt (FM1)	-	-	1.5	1.9
	Hagemann Matthias (Basilisk)	1.4	1.2	1	1.2
	Förderverein Radio BeO (BeO)	0.9	0.8	0.8	1
	Südostschweiz Presse + Print (Grischa)	1.4	0.6	0.6	0.6
	Zürichsee Medien AG (Zürisee, Capital FM)	2.2	2.5	2.5	2.9
	AZ Medien AG (Radio 32)	1.8	1.6	1.6	1.6
	Heuberger Günter (Top)	1.5	1.4	1.6	1.1
	Others private	0.5	0.9	0.9	1
	Others	8.7	7.1	4.2	5.5
	C4	73.7	75.6	77.3	74.1
HHI	4,010	4,350	4,703	4,334	
N (>1%)	14	13	14	15	
Noam Index	1,072	1,206	1,257	1,119	
French-Language Market	SRG SSR	59.2	62.6	64.7	66.2
	Private stations in Switzerland	21.5	21.5	21.7	21.9

	Sonal FM (Yes FM)	1.6	1.8	1.6	1.6
	Overshop Holding SA (One FM, LFM)	5	5.5	6	5.8
	Unicast (Rouge FM)	2.9	2.7	2.8	3.3
	Association du Chablais (Radio Chablais)	1.7	1.7	1.5	1.6
	RTN	1.8	2.6	2.8	-
	RJB	1.7	1.1	0.9	-
	RFJ	2.6	1.8	1.7	-
	BNJ Media Holding SA (RTN, RJB, RFJ)	-	-	-	4.8
	Rhône FM SA	2.5	2.4	2.3	2.3
	Damien Piller (Fribourg)	1.7	1.9	2.1	2.5
	Radio France (public) (France)	5.4	5.2	4	3.7
	NRJ Group (NRJ, Nostalgie) (private) (France)	5.6	4.7	3.9	3.9
	Others	8.3	6	5.7	4.3
	C4	75.2	78	78.6	79.6
	HHI	3,626	4,032	4,286	4,496
	N (>1%)	12	12	11	10
	Noam Index	1,047	1,164	1,292	1,422
Italian-Language Market	SRG SSR	79.8	82.9	84	82.3
	Private stations in Switzerland	4.2	4.5	6.7	10.4
	Timedia Holding SA (R3iii)	2.2	2.7	4.6	6.3
	Fondazione UCGBC (Fiume Ticino)	2	1.8	2.1	4.1
	RAI (public) (Italy)	2.2	1.4	1	0.6
	RTO (private) (Italy)	3	2.4	1.9	2.1
	Others	10.8	8.8	6.4	4.6
	C4	87.2	89.8	91.5	94.8
	HHI	6,391	6,891	7,086	6,855
	N (>1%)	6	6	6	5
	Noam Index	2,609	2,813	2,893	3,066
Total Revenue (mil CHF) ²			575	602	648
Total Revenue (mil US\$)			463	558	691

Source: Our calculations based on data from Mediapulse AG. <<http://www.mediapulse.ch>> for market shares.¹

- 1 The market shares are calculated on a listeners' panel sampling (number of minutes of listening by the panel). Comparisons between 2001 and other years have to be made with caution due to changes in the data collection.

2 This revenue figure is an estimate by adding advertising revenues, including revenues from sponsoring (source: Fondation Statistique Suisse en Publicité) to the radio “budget” estimated for all radio consumers in Switzerland (source: Schweizer Medien, op. cit.; only the budget for “content” is taken into account, not expenses for radio devices).¹

In 2012, the market share for foreign radio channels was only 4.4% in the German-language market, 6.5% in the Italian-language market, and 10.3% in the French-language market. Swiss commercial radio is more developed in the French and German markets (23.8% and 30.2%, respectively) than in the Italian one (11.2%). Each commercial radio channel has a very small market share: for example, in 2012 the market share of Radio 24, which is the largest commercial radio broadcaster in Switzerland and has over 300,000 regular daily listeners, was about 3% in the German-language market.

Concentration is very high in the Italian-language market: in 2012, the C4 ratio was around 95% and the HHI around 6,900. For the same year, the C4 ratios for the other language markets were high but fewer than 80% and the HHI was less than 4,500. In general concentration is high because of SRG SSR’s large market share. We provide estimations of the concentration indices at the national level for 2008 and 2012 by taking into account the number of regional listeners (Table 14.4).

Table 14-4. Radio (Estimated Audience Shares by %)

	German-Language Market		French-Language Market		Italian-Language Market		All (National)	
	2008	2012	2008	2012	2008	2012	2008	2012
SRG SSR	68.2	65.4	64.7	66.2	84	82.3	68.08	66.35
ARD (Public Germany)	3.4	2.7					2.44	1.94
Belcom AG (Radio 24)	2.9	3					2.08	2.16
Ringier AG (Energy Zürich, EnergyBern)	2.8	3					2.01	2.16
Zürichsee Medien AG (Zürisee, Capital FM)	2.5	2.9					1.79	2.09
Overshop Holding SA (One FM, LFM)			6	5,8			1.42	1.37
Others	20.2	23.0	29.3	28.0	16.0	17.7	22.17	23.94
Audience (1,000) ¹	4,505.5	4,742.9	1,490.3	1,552.1	281	297.2	6,276.8	6,592.2
C4	77.3	74.1	78.6	79.6	91.5	94.8	74.6	72.6
HHI	4,703	4,334	4,286	4,496	7,086	6,855	4,654	4,422
N (>1%)	14	15	11	10	6	5	6	6
Noam Index	1,257	1,119	1,292	1,422	2,893	3,066	1,900	1,805

Source: our calculations based on data from Mediapulse AG, <<http://www.mediapulse.ch>>.

1 The number of listeners is based on a “universe” estimate, i.e., all Swiss citizens 15 or more years old who live in a home with radio (source: Mediapulse AG).

Television

In Switzerland most homes receive radio and television programs by cable. Moreover, terrestrial television has been fully upgraded to digital terrestrial television (DTT). If we look at TV audience shares in the entire television market (combining broadcast TV, cable TV, satellite TV), in the long run the market share of SRG SSR has diminished. If we consider only the last 10 years, though, the situation is less clear: we can say that the market share of SRG SSR tends to be around one-third of the total national audience (slightly higher in the Italian-speaking regions of Switzerland) (Table 14.5).

Table 14-5. Combined Television Network Industries: Broadcast TV Networks, TV Syndicators, Cable Channels, Pay-TV (Estimated Market Shares by Audience)

Swiss Language Markets	(b)	1992	1996	2000	2004	2008	2012
German-language market	SRG SSR	31.0	34.5	33.1	35.2	34.8	30.0
	ARD + ZDF + 3SAT (public) (Germany) ¹	16.0	12.1	10.8	11.4	11.6	10.7
	ARD	8.0	6.1	5.6	5.7	5.5	4.7
	ZDF	8.0	5.9	5.2	5.7	6.1	6.0
	ZDF	7.0	5.0	4.3	4.8	5.0	4.7
	3SAT	1.0	0.9	0.9	0.9	1.1	1.3
	ORF1 + ORF2 (public) (Austria)	8.0	7.8	6.5	6.3	4.9	3.5
	RTL Group (Bertelsmann AG, Germany)	14	14.6	11.9	11.7	9.5	11.5
	ProSiebenSat.1 Media (Germany)	9.0	15.7	11.6	11.2	10.7	9.7
	Others	22.0	15.3	26.1	24.2	28.5	34.6
	All private Swiss TV (such as TeleZüri)			7.3	4.0	5.0	6.9
	C4	70.0	76.9	67.4	69.5	66.6	61.9
	HHI	1,558	1,857	1,531	1,671	1,574	1,253
	<i>N</i> (>1%) ²						
Noam Index	697	831	685	747	704	560	
French-language market	SRG SSR	36.0	35.0	35.0	32.0	32.0	29.0
	France télévisions (Public French channels, such as France 2, France 3 . . .)	20.0	21.0	17.0	18.0	17.0	13.0
	TF1 (France)	22.0	16.0	16.0	17.0	14.0	13.0
	RTL Group (Bertelsmann AG, Germany)	6.0	8.0	7.0	9.0	10.0	10.0
	AB Group (France)			5.0	4.0	3.0	2.0
	Others	16.0	20.0	20.0	20.0	24.0	33.0
	C4	84.0	80.0	75.0	76.0	73.0	65
	HHI	2,216	1,986	1,844	1,734	1,618	1,283
	<i>N</i> (>1%) ³						
	Noam Index	1,108	993	825	775	724	574
Italian-language market	SRG SSR	33.0	33.6	34.0	37.2	35.4	37
	RAI (public) (Italy)	24.0	25.1	23.7	21.0	22.0	20
	Mediaset (Berlusconi Family, Italy)	20.0	29.3	28.4	26.8	25.6	22
	Telecom Italia Media (Italy) ⁴		2.0	1.7	1.8	1.3	2
	TicinoNews			0.9	1.2	1.8	1
	Others	23.0	10.0	11.3	12	13.9	19
	C4	77.0	90.0	87.8	86.8	84.8	81

	HHI	2,065	2,621	2,528	2,548	2,397	2,258
	$N (>1\%)^5$						
	Noam Index	1,192	1,311	1,131	1,140	1,072	1,010
Total Revenue (mil CHF) ⁶					1,351	1,479	1,633
Total Revenue (mil US\$)					1,089	1,370	1,742

Source: Our calculations based on data from Mediapulse AG <<http://www.mediapulse.ch>> for market shares.⁷

- 1 3SAT is a German-language collaboration network that comprises ZDF and ARD (German), ORF (Austria), and Schweizer Fernsehen SF (SRG SSR, Switzerland) that is controlled by ZDF.
- 2 The HHI and the Noam Index were calculated for only five firms; $N (>1\%)$ is not known.
- 3 The HHI and the Noam Index were calculated for only four firms for the years 1992 and 1996, and for only five firms for 2000, 2004, 2008, and 2012; $N (>1\%)$ is not known.
- 4 LA7 is a private channel owned by Telecom Italia since 2001; before 2001, there were other owners and the channel was called *Telemontecarlo*.
- 5 The HHI and the Noam Index were calculated for only three firms in 1992, four firms in 1996, and five firms for 2000, 2004, 2008, and 2012; $N (>1\%)$ is not known.
- 6 To estimate the value of the market here, we added advertising revenues, including revenues from sponsoring (source: Fondation Statistique Suisse en Publicité; advertising revenues include the advertising revenues of all the Swiss channels and “foreign advertising windows,” i.e., advertising windows operating on foreign TV channels), and the national TV “budget,” estimated for all TV viewers in the country (source: Schweizer Medien; only the budget for “content” is taken into account, not expenses for TV devices or expenses for TV access).
- 7 The market shares are calculated on a viewers’ panel sampling (time of use by the panel. Source: Mediapulse AG). The concentration indices are calculated by taking into account the public channels together. The market shares of the two main German-language channels are indicated in the table, but the concentration indices are based on the sum of all public German-language channels. The HHI and Noam Index are estimated on the basis of the main market shares; $N (>1\%)$ is not known.

Concentration is highest in the Italian-language market: in 2012, the C4 ratio was around 80% and the HHI around 2,300, while for the same year the C4 ratios for the other language markets were a little over 60% and the HHI around 1,300. This higher concentration for the Italian-language market is linked to the large market shares of RAI and the channels owned by Mediaset: *Canale 5*, *Italia 1*, and *Rete 4*.

In any case, all the estimated concentration indices are not at high levels. Moreover they tend to diminish between 2008 and 2012. If we consider Switzerland at a whole, the diversity of TV channels is very strong, with public and private Swiss channels and many foreign channels; only SRG SSR has a large market share at the national level. We provide estimations of the concentration indices at the national level for 2008 and 2012 by taking into account the number of regional viewers (Table 14.6).

Table 14-6. Combined Television Network Industries (Estimated Audience Shares by %)

	German-Language Market		French-Language Market		Italian-Language Market		All (National)	
	2008	2012	2008	2012	2008	2012	2008	2012
SRG SSR	34.8	30.0	32.0	29.0	35.4	37.0	34.2	30.1
ARD + ZDF + 3SAT (public) (Germany)	11.6	10.7					8.4	7.7
ProSiebenSat.1 Media (Germany)	10.7	9.7					7.7	7.0
ORF1 + ORF2 (public) (Austria)	4.9	3.5					3.5	2.5
France télévisions (Public French channels, such as France 2, France 3 . . .)			17.0	13.0			4.0	3.1
TF1 (France)			14.0	13.0			3.3	3.1
RTL Group (Bertelsmann AG, Germany)	9.5		10.0	10.0			2.3	2.4
Public Italian channels (RAI)					22.0	20.0	0.9	0.9
Mediaset (Berlusconi Family, Italy)					25.6	22.0	1.1	1.0
Others	28.5	36.6	27.0	35.0	17.0	21.0	34.5	42.3
Audience (1,000) ¹	5,033	5,106.7	1,634	1,678.5	3,080	324.6	6,975	7,109.8
C4	66.6	61.9	73.0	65.0	84.8	81.0	54.2	47.8
HHI	1,574	1,253	1,618	1,283	2,397	2,258	1,343	1,044
<i>N</i> (>1%) ²								
Noam Index	704	560	724	574	1,072	1,010	475	369

Source: our calculations are based on data from Mediapulse AG <<http://www.mediapulse.ch>>.

- 1 The number of viewers is based on a “universe” estimate, i.e., all Swiss citizens three or more years old who live in a home with television and phone connections (source: Mediapulse AG). When data are unavailable for some channels for some regions, we treat those market shares as zero.
- 2 The HHI and the Noam Index were calculated for only eight firms at the national level; *N* (>1%) is not known.

Concentration appears low at the national level. Of course, the concentration indices are estimated, but it is obvious that the TV market is diversified because of the linguistic and geographic situation of Switzerland. The same conclusion is not applicable for the radio market, because the market share of SRG SSR for radio is large and commercial radio broadcasters have small market shares.

Film

In the long run, the number of movie viewers has decreased in Switzerland, although for more than two decades, attendance has stayed at a rather high level, between 14 and 19 million per year.

Most of the films distributed in Switzerland are foreign films, in particular films produced in the United States by the Hollywood majors. For the last decade, the market share for Swiss films has fluctuated

p. 367 between 2.3% (in 2001) and 9.5% (in 2006); if we add films that have ↵

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been coproduced with other countries, the share fluctuates between 3.5% (in 2001) and 9.7% (in 2006). There are supportive measures to the Swiss production or coproduction of films.

The main distributors are the Walt Disney Studios, United International Pictures (UIP), Warner Brothers, and 20th Century Fox. These four distributors hold more than 60% of the distribution market. The HHI was around 1,300 in the years 2009–2010, which indicates a moderate concentration, though the C4 ratio was quite high.

There are two main exhibitors in Switzerland: Pathé (UCS Group, France), with a market share (based on the number of admissions) of 25.8% in 2010, and Kitag (Kino-Theater AG, Switzerland), with a market share of 19.8%. Kitag belongs to CT Cinetrade AG; Swisscom, the main Swiss Telecom enterprise, has a 49% stake in CT Cinetrade AG. Other domestic exhibitors include Cinépel SA, Cinérive SA, and Liag-Capitol, though they have smaller market shares. For example, in 2010 Kitag represented 20,363 seats and Pathé 15,893 seats, while Cinépel controlled only 5,558 seats, Liag-Capitol 2,506, and Cinérive 2,288 (Table 14.7).

Table 14-7. Film Production/Distribution (Market Shares by Box Office %)

	2009	2010
Walt Disney (US)	21.2	18.3
United International Pictures (UIP) (Paramount [Viacom] + NBCUniversal [Comcast/GE], US)	12.9	17.9
Warner Brothers (Time Warner) (US)	14.3	16.3
20th Century Fox (News Corp., Murdoch Family, US/UK/AUS)	15.5	12.0
Elite-Film (Ascot Elite Entertainment Group)	11.4	11.0
Pathé Film (France)	8.7	5.8
Frenetic Films	4.4	5.5
Filmcoopi Zürich	2.8	2.8
JMH Distributions	1.6	1.5
Xenix Filmdistribution (Switzerland)	1.0	1.5
Total Revenue (mil CHF) ¹	262	262
Total Revenue (mil US\$)	242	252
C4	63.8	64.4
HHI	1,294	1,258
<i>N</i> (>1%)	10	10
Noam Index	409	398

Source: Our calculations based on data from Swiss Federal Statistical Office <<http://www.bfs.admin.ch/>> for market shares.

- 1 To estimate the value of the market here, we added the advertising revenues (source: Fondation Statistique Suisse en Publicité) and the national cinema “budget,” estimated for the population in the country (source: Schweizer Medien).

Wireline Telecom

p. 370 The Swiss telecommunications market was opened to competition in 1998 by the Telecommunication Law of April 30, 1997. Swisscom ↴

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was created in January 1998 by the partition of Swiss Telecom PTT into the two companies Swiss Post and Swisscom Ltd. Swisscom is a public limited company (plc) with a special status under Swiss law; the federal government holds a majority of the capital and voting rights in Swisscom. Although the Telecommunication Law was revised in 2006, Swisscom is today the main telecom and Internet service provider (ISP) in the country.

However, the wireline market has diminished in volume: the 2008 call turnover for fixed telephone lines was 4.5 billion, in comparison to 6.9 billion in 1999, a 35% decrease. Sunrise (UK) is the second main operator, but its market share is much less than that of Swisscom's: in 2008, its market share only reached 10.8%. Sunrise belonged to TDC, a Danish telecom operator, until October 2010, and it is now part of CVC Capital Partners, a British private equity group. The third main operator is Cablecom, a subsidiary of Liberty Global (US), and it posted a 7.8% market share in 2008 and a 8.6% market share in 2011. In 2008 the fourth significant operator was TelCommunication Services (formerly Tele2), which had a 5.8% market share. Sunrise (UK) acquired Tele2 Switzerland in 2009 and continued to offer services under the brand until 2011, when the brand license ran out. In November 2011, Tele2 became Tele4U, a subsidiary of Sunrise (UK). Sunrise (UK) and TelCommunication Services are considered separately until 2008 in Table 14.8. With TelCommunication Services, the market share of Sunrise (UK) for wireline reached 15.1% in 2009, but it declined and stood at just 13.8% in 2010 and 13.6% in 2011. Table 14.8 gives concentration indices on the basis of the number of subscribers. The wireline market is very concentrated, with a C4 ratio over 85% and an HHI over 4,200 in 2011. But concentration has decreased since 2007, because of a slight decrease of the Swisscom market share and the growth of small-size operators.

Table 14-8. Wireline Telecom (Market Shares by Subscribers)

	2007	2008	2009	2010	2011 Provisional
Swisscom (public)	67.8	68.3	68.2	65.3	63.1
Sunrise (CVC Capital Partners, UK)	11.4	10.8	15.1	13.8	13.6
TelCommunication Services (before 2009: Tele2, Sweden; after 2009: Sunrise, UK)	7.2	5.8	4.1	2.4	1.9
Cablecom (Liberty Global, US)	7.2	7.8	7.6	8.2	8.6
mobilezone.com	0.5	0.7	0.9	1.0	1.6
The Phone House/Talk Talk Telecom (Carphone Warehouse, UK)	1.6	1.3	1.7	1.4	1.3
TalkEasy GmbH	0.0	0.0	0.3	1.5	1.3
Orange Network SA (France Telecom, France, until 2012; Apax Partners, UK, since 2012)	0.0	0.1	0.2	1.2	1.2
abalon telecom it ag	0.6	0.6	0.6	0.6	0.5
Backbone Solutions	0.3	0.5	0.6	0.6	0.5
Netstream	0.3	0.4	0.4	0.6	0.5
Finecom Telecommunications	0.2	0.4	0.5	0.6	0.7
Others	2.8	3.3	3.9	5.3	6.9
Total Revenue (mil CHF) ¹	5,470	5,116	5,409	5,263	5,199
Total Revenue (mil US\$)	4,563	4,738	4,995	5,059	5,885
C4	93.6	92.7	92.6	88.8	86.9
HHI	4,833	4,878	4,940	4,528	4,248
N (>1%)	5	5	4	7	7
Noam Index	2,161	2,181	2,470	1,712	1,606

Source: Our calculations based on data from OFCOM <<http://www.bakom.admin.ch/>> for market shares.

1 Source OFCOM: Fixed network services.

p. 372 **Wireless Telecom**

The mobile market has grown quickly in Switzerland at the expense of the wireline market. And it is highly concentrated: as of 2011, three operators represented 95.6% of the market. Swisscom, as noted earlier, is the leader here, with a 59.7% market share in 2011. The two other main operators are Sunrise (UK), at 20.8% in 2011, and Orange Suisse, at 15.1% in 2011. In November 2009, Orange and Sunrise (UK) had announced a merger: at that time the resulting joint venture (New Orange) would have represented about 38% of the market, but in April 2010, Comco—the federal competition commission—ruled against the merger on the grounds that it would have reduced wireless telecom competition.²⁰ But, as explained by the Federal Council in September 2010: “[t]he strong market share held by the incumbent operator [Swisscom] over the years and the balance of power between the various players reflects the low intensity of competition on the Swiss mobile phone market.”²¹ In February 2012, Orange Suisse was sold by France Telecom to Matterhorn Mobile, a Swiss company controlled by Apax Partners (UK), a British private equity company. At the end of 2014, Xavier Niel, the owner of the French company Free (Iliad), entered an agreement to buy Orange Suisse, via NJJ Capital, his private holding company. The acquisition is subject to regulatory approvals (Table 14.9).

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Table 14-9. Wireless Telecom (Market Shares by Subscribers)

	2007	2008	2009	2010	2014
Swisscom (public)	61.0	60.4	60.2	59.4	53.1
Sunrise (CVC Capital Partners, UK)	18.6	19.2	19.9	20.9	25.1
TelCommunication Services (before 2009: Tele2, Sweden; from 2009: Sunrise, US)	1.0	1.1	0.5	Sunrise	Sunrise
Salt Niel/Iliad (France) (France Telecom, France, until 2012; Apax Partners, UK, 2012–2014)	18.4	17.3	16.7	15.5	16.7
Lebara (owners: Leon Rasiah, Baskaran Kandiah, Ratheesh Yoganathan, UK)	0.8	1.1	1.5	2.6	2.5
The Phone House AG/Talk Talk (Carphone Warehouse, UK)	0.2	0.1	0.2	0.1	0.1
In&Phone SA	0.0	0.0	0.1	0.3	0.3
Lycamobile AG	0.0	0.8	1.3	1.0	1.0
BEEONE Communications AG	—	—	—	0.2	0.3
Total Revenue (mil CHF) ¹	4,817	5,044	4,629	4,881	10,170
Total Revenue (mil US\$)	4,018	4,672	4,274	4,692	10,928
C4	99.0	98.0	97.8	98.2	98.3
HHI	4,407	4,319	4,282	4,206	3,804
<i>N</i> (>1%)	4	5	5	5	5
Noam Index	2,203	1,931	1,915	1,881	1,893

Source: Our calculations based on data from OFCOM <<http://www.bakom.admin.ch/>> for market shares. 2014 data for minor providers based on 2011 figures.

1 Source OFCOM: Mobile network services.

Internet Media

Internet Service Providers (ISP)

The number of subscribers to the Internet has increased considerably for the last decade in Switzerland. More than 50% of the whole market. The two other main companies are Cablecom (US), with a 17.1% market share in 2010, and Sunrise (UK), with a 11.7% market share in 2010 (Sunrise and TelCommunication Services are considered separately until 2008 in Table 14.10). Concentration is high, with a C4 ratio of 84.7% and an HHI of 3,300 in 2010.

Table 14-10. Internet Service Providers (Market Shares by Subscribers)

	2007	2008	2009	2010
Swisscom (public)	48.5	52.8	53.2	53.7
Cablecom (Liberty Global, US)	19.5	17.6	17.2	17.1
Sunrise (CVC Capital Partners, UK)	10.5	8.6	11.9	11.7
TelCommunication Services (before 2009: Tele2, Sweden; from 2009: Sunrise, US)	3.0	2.7	1.7	0.0
green.ch	1.2	2.4	2.4	2.2
ImproWare	1.1	1.1	1.2	1.2
Finecom Telecommunications	0.9	1.3	1.5	1.5
VTX Services	1.1	1.0	1.0	1.0
Ticinocom	1.4	1.0	0.9	0.3
WWZ Telekom	0.5	0.6	0.6	0.7
Netstream AG	0.4	0.3	0.5	0.7
Others	11.9	10.6	9.6	9.9
Total Revenue (mil CHF) ¹	871	920	964	955
Total Revenue (mil US\$)	727	852	890	918
C4	81.5	81.7	83.0	84.7
HHI	2,858	3,190	3,243	3,322
<i>N</i> (>1%)	8	9	8	7
Noam Index	1,010	1,063	1,147	1,256

Source: Our calculations based on data from OFCOM <<http://www.bakom.admin.ch/>> for market shares.

- 1 This revenue figure is an estimate based on the “budget” dedicated by the population to Internet access (excluding expenses for content or for devices). Source: Schweizer Medien.

Search Engines

Google (US) has a quasi-monopoly in the search engines market, with a market share above 90% in recent years. Nevertheless, the Google’s market share has decreased for the last two years (Table 14.11).

Table 14-11. Internet Search Engines (Market Shares by Search Volume)

	2008	2009	2010	2011	2012	2013
Google (US)	96.0	96.6	97.1	91.0	91.2	89.9
Bing (Microsoft, US)	0.0	1.3	1.4	3.4	3.2	3.6
Yahoo! (US)	2.0	1.3	0.9	3.6	3.0	3.2
Bluewin (public) (Swisscom)	0.0	0.3	0.3	—	—	—
Ask Jeeves (US)	0.0	0.2	0.1	0.4	—	—
Baidu (China)	—	—	—	—	0.45	0.9
C4	98.0	99.6	99.7	98.4	97.9	97.6
HHI	9,220	9,335	9,430	8,306	8,337	8,105
<i>N</i> (>1%)	2	3	2	3	3	3
Noam Index	6,520	5,390	6,668	4,795	4,813	4,680

Source: Our calculations based on data from StatCounter Global Stats. <<http://gs.statcounter.com/>>, for months of July except 2013, where it is the month of March.

p. 374 **Online News**

Measuring concentration for the online news market in Switzerland is difficult. There is no official definition of this industry in the country, and various criteria have been used to measure online audience shares. Our categories are (1) most popular websites (both Swiss and non-Swiss) and (2) most popular Swiss news websites (Swiss only).

The Ringier Group uses Nielsen reports to rank website popularity in the Swiss market. The most popular sites are those of Google, Facebook, YouTube, and Microsoft. In order to calculate concentration indices, the market may be defined as the sum of all monthly “unique hits” for the main websites (Table 14.12).

Table 14-12. Most Popular Websites in Switzerland (Market Shares by Monthly Unique Visitors), October 2011¹

	Market Penetration (%)	Monthly Unique Visitors (1,000)	Estimated Market Shares (%)
Google (US)	83.4	3,268	30.1
YouTube (US)	47.7	1,870	
MSN/Windows Live/Bing (Microsoft, US)	47.1	1,846	21.3
Microsoft (US)	45.4	1,777	
Bluewin (public) (Swisscom)	36.5	1,431	14.1
Local.ch (Swisscom, public)	24.9	978	
Facebook (US)	56.1	2,198	12.9
Wikipedia (US)	35.9	1,405	8.2
Apple (US)	33.6	1,317	7.7
Search.ch (Tamedia/Swiss Post)	24.5	960	5.6
C4			78.4
HHI			1,885
$N (>1\%)^2$			
Noam Index			712

Source: Our calculations based on data from the Nielsen Company (survey in October 2011), in Ringier AG.

- 1 Ringier AG. "Abécédaire publicitaire 2012." Zurich: Go4Media, 2012. 27. To calculate the concentration indices, MSN/Windows Live/Bing and Microsoft are considered as one group, as are Google and YouTube; Bluewin and local.ch are also considered to be one group.
- 2 The HHI and the Noam Index were calculated for only seven firms; $N (>1\%)$ is not known.

The C₄, which corresponds to the four main entities, stood at 78% in 2011, which is high, while the HHI stood at 1,885, indicative of a moderately concentrated market. Of course, this approach gives somewhat biased estimates of concentration, since all websites and all unique hits are taken into account, without distinction regarding contents.

For Table 14.13, we used data given by NET-Metrix, which concern only Swiss websites, and we selected the websites that appeared to be the most representative of news. Of course, the estimated indices are debatable, but they give an idea of the evolution of the Swiss online news market. Since foreign firms are not included in the data, the audiences of websites such as Google News, Yahoo! News, LeMonde.fr, and Bild.de are ignored in Table 14.13.

Table 14-13. Online News Swiss Media (Market Shares by %)¹

	2008	2010	2012
Swisscom (public) (www.bluewin.ch/)	21.1	14.2	10.3
SRG SSR	21.6	20.3	16.5
TV	15.7	15.1	
Radio	5.9	5.3	
Tamedia (Coninx Family)	19.1	21.0	26.5
Edipresse	7.6	7.3	
Ringier (Ringier Family)	12.2	13.8	12.3
NZZ Medien Gruppe	6.7	6.2	5.6
Virtual Network (www.romandie.com/news/)	3.2		
Basler Zeitung Medien	1.8	1.7	
Axel Springer Schweiz (Germany)	1.6	6.6	6.2
Neue Luzerner Zeitung	1.3		
ProSiebenSat.1 Digital (Germany)		2.1	4.2
Zattoo International		1.8	1.7
1&1 Mail & Media GmbH			4.0
Gartenhof Medien			2.1
AZ Medien			2.4
MedienVielfalt Holding (Tito Tettamanti)			1.4
Edition Suisse Holding (Groupe Hersant)			1.2
Others	12.3	1.0	5.7
C4	69.3	62.9	65.6
HHI	1,408	1,310	1,350
N (>1%)	10	12	13
Noam Index	445	378	374

Source: Our calculations based on data from NET-Metrix <<http://www.net-metrix.ch/>>.

- 1 The market shares were calculated using NET-Metrix data based on the number of “unique users” per month. They are estimated by an averaging of the data for the period from October 1 to December 31 for every year.

p. 375 The market shares of public online news sites or news sites that must apply public regulation ↴

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is relatively large: Bluewin, the Swisscom news portal, is a main competitor for traditional print media’s news portals in Switzerland, and SRG SSR’s online versions of its radio and TV broadcasts have naturally quite large audiences. Nevertheless, we can observe that the main Swiss newspaper companies have a strong online presence and that the market share of Bluewin actually decreased significantly between 2008 and 2012. Tamedia/Edipresse had a market share equal to 26.5% in 2012 and NZZ Medien Gruppe around 6% in 2012. The market share of Ringier is stable around 12–13%, while Axel Springer’s market share increased since 2008. There are other companies with quite low market shares. Although the C4 ratio is over 60%, the

HHI is quite low because various news websites have developed in recent years. The figures overestimate concentration in the industry because data for foreign websites were not taken into account.

Conclusion

p. 377 Swiss publishing houses will continue to seek expansion of their cross-platform presence in the coming years. Ringier, for example, is present in print, broadcast, Internet, and mobile \hookrightarrow telecom applications, as well as in printing, entertainment, and e-commerce as an “integrated multinational media company.” In 2012, Michael Ringier, chairman and joint co-proprietor of Ringier AG alongside his sisters Annette Ringier and Evelyn Lingg-Ringier, declared: “We shall always be a press company with the main business based on print media” and “we shall also exercise more businesses which have nothing to do with journalism. In entertainment, in e-commerce, we are going to continue the diversification of our revenue streams to decrease our dependence on economic cycles.”²² In December 2014 Ringier and Axel Springer planned to establish a joint venture in Switzerland. Of course, it will increase the level of concentration in the Swiss press. Tamedia’s activities cover newspapers, magazines, printing, and Internet services as well. But every strategy is not necessarily in favor of diversification. Concerning Tamedia, it had expanded its radio and television arms, but since its acquisition of Edipresse, its growth strategy has been refocused on newspapers, magazines, and Internet services. And in the telecom sector, operators offer both wireline and wireless services, as well as Internet services, but they have not entered into the content industries, except for Swisscom’s Bluewin.

The presence of foreign operators in Switzerland is likely to grow in the coming years. Switzerland has always been open to media content from other countries, though historically, Swiss companies dominated the domestic media market. With the exception of book publishing and film, the entry of foreign companies is quite recent. But Germany’s Axel Springer is now a major company in the magazine industry and Philippe Hersant has entered the French-language newspaper market. In print media, the big Swiss publishing companies, such as Tamedia and Ringier, are mainly involved in newspapers and magazines, but foreign companies dominate the book publishing scene.

In radio and TV broadcasting, SRG SSR is still dominant, but many national and foreign channels are accessible. Concentration is high in radio but quite low in TV. The Swiss commercial broadcasting market is small and has developed more in radio than in TV, particularly for the German- and French-language markets. The TV market reflects the opening of the Swiss market to foreign channels: concentration is low, because many foreign channels in French, Italian, and German are accessible.

In the telecommunications and Internet services sectors, Swisscom is still dominant, but foreign operators are pulling market shares away from it. Swisscom has a special status as a public limited company: its major shareholder, with a stake of 51.2% in December 2013, is the Swiss Confederation (Government of Switzerland), which by law must hold a majority stake in Swisscom’s investment capital and voting rights. Sunrise (UK) is an important operator in all sectors, and the mobile operator Orange Suisse, now owned by Xavier Niel, the main holder of Iliad in France (and renamed Salt), is present in wireless telecom, although it suffered a setback when Comco ruled against its merger with Sunrise (UK). Cablecom (US) is also an important operator in wireline telecom and Internet services. The growth of mobile telecom has been a significant trend over the last 10 years.

p. 378 Concentration is relatively moderate in Switzerland. Although concentration indices appear to be quite high for some industries, the Swiss market is small compared to other European markets. Moreover, most Swiss media sectors are characterized by the presence of some Swiss major groups with large market shares and by a diversity of editorial voices. Concentration is not a simple phenomenon²³ \hookrightarrow and, in particular, ownership concentration does not necessarily mean information concentration. The Swiss major media groups are small compared to big multinational groups. For example, in 2011, Ringier and Tamedia had turnovers around 1.2 billion US\$, while the turnover of Bertelsmann was around 21 billion US\$ and the turnovers of the main US media companies were over 25 billion US\$: Comcast was around 63 billion US\$, Walt Disney around 42 billion US\$, Google around 41 billion US\$, and Time Warner was 29 billion US\$ (see Badillo and Proulx about the globalization of the communication sector).²⁴

The state of the daily newspaper market illustrates the complexity of the Swiss media landscape. From the standpoint of the C4 ratio, concentration appears high, with C4 equal to 80.5% in 2012, but by observing the

HHI, concentration appears less high (HHI standing at 2,520 in 2012). And the Noam Index (in 2012) is only at 699, although it does not take into account the total number of titles, which is very high in Switzerland. However, the future is uncertain for paid-subscription daily newspapers. The merger of Edipresse and Tamedia, for example, has reinforced concentration.

Finally, two contradictory elements must be understood with respect to the Swiss media landscape concerning concentration. First, Switzerland is a small country and, theoretically, high concentration indices should be expected. Some industries are indeed characterized by quite high C4 and HHI; the Swiss market is narrow compared to those of its neighbors, and few new companies can develop. But, as already noted, in comparison to nearby European countries, the diversity of editorial voices is high, particularly in print and audiovisual media. Because of its geographic and linguistic situation, Switzerland offers opportunities to various companies, including foreign companies, and concentration is not as high as it could be for such a small national media market. Of course, many changes can be expected in the coming years: the rise of online media, the development of mobile services, and the race for a share of reduced advertising revenue could accelerate the process of concentration in some industries, especially for print media.

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Switzerland—Data Summaries

OWNERSHIP CONCENTRATION IN SWITZERLAND has been high but stable in recent years—the country’s power index stayed 3,633 in 2004 and 3,690 in 2011. C4 is particularly high for newspapers and magazines due to mergers and acquisitions (Table 14.14). Federal restrictions on cross-ownership are relatively limited because the government deemed the national media industries to be “self-regulating.” Switzerland’s small market size and three language regions predispose it to high levels of internal concentration. Its linguistic diversity has proven conducive to investment by French and German media groups (as well as Italian groups to a lesser extent). Germany’s public broadcasters and commercial operator ProSiebenSat.1, along with France Télévisions, hold small market shares in the audiovisual markets. Many Swiss TV viewers tune in to the channels of the neighboring countries. The largest directforeign operator though, is Liberty Global (US), which controls 74% of the multichannel platforms industry, making it the third-largest platform operator.

Table 14-14. National Media Industries Concentration in Switzerland

	2004/5		2011 or Most Recent		% Change Annual Average	
	Company Power Index in Country	Company Share of the Overall National Media Market (%)	Company Power Index in Country	Company Share of the Overall National Media Market (%)	Company Power Index in Country	Company Share of the Overall National Media Market (%)
Swisscom (public)	2,470	38.600	2,404	39.207	-0.3	0.076
Liberty Media (US)	343	7.705	372	8.304	1.05	0.075
SRG SSR (public)	323	6.597	268	5.774	-2.1	-0.103
TDC (Sunrise, Denmark)	98	6.955	99	5.996	0.13	-0.120
Tamedia	171	5.086	201	4.995	2.18	-0.011
Ringier	32	2.236	57	2.758	9.8	0.065
Edipresse	24	1.935	29	1.935	2.6	0.000
Axel Springer (Germany)	24	0.910	31	1.083	3.4	0.022
ProSiebenSat.1 (Germany/US)	6	0.81	5	0.73	-2.4	-0.01
ARD (Germany) (public)	2	0.54	2	0.46	-2.6	-0.01
ZDF (Germany) (public)	2	0.44	1	0.39	-2.4	-0.01
France Télévisions (France) (public)	2	0.42	1	0.31	-5.3	-0.01
Media Concentration Index						
			2004/5	2011 or Most Recent	% Change Annual Average	
Total Revenue: Nat'l Media Industry (mil US\$)			13,076	17,342	4.08%	
Total Voices (<i>n</i>)			62	62	0.00	
Net Voices (<i>n</i>)			49	49	0.00	
Public Ownership (%)			28.6	28.1	-0.1	
Foreign Ownership (%)			24.1	25	0.1	
C4 Average—Weighted			84.0	83.4	-0.08	
HHI Average—Weighted			3,661	3,807	0.50	
C1 Average—Weighted			55	56	0.00	
Noam Index Average—Weighted			903	1,263	4.9	
Pooled Overall Sector C4			53.3	53.6	0.03	
Pooled Overall Sector HHI			1,694	1,740	0.33	
Pooled Overall Sector Noam Index			92	103	1.5	

Market Share of Top Eight Companies: Nat'l Media Industry (%) (Pooled C8)	76.9	79.8	0.7%
National Power Index	3,633	3,690	0.20

The public broadcaster SRG SSR is the largest single entity in the radio and television broadcasting markets in every linguistic group, accounting for high concentration rates in these markets and holding 18% of all content media (Table 14.15).

Table 14-15. Top Content Media Companies in Switzerland

	2004/5		2011 or Most Recent		% Change Annual Average	
	Company Power Index in Country	Company Share of the National Content Media Market (%)	Company Power Index in Country	Company Share of the National Content Media Market (%)	Company Power Index in Country	Company Share of the Overall National Media Market (%)
SRG SSR (public)	903	18.464	837	18.004	0.92	-0.057
Google (US)	69	0.72	352	3.91	0.51	0.40
Liberty Global (US)	281	3.795	341	4.610	2.7	0.102
Tamedia	479	14.237	626	15.576	3.9	0.167
Ringier	89	6.258	177	8.6202	12.3	0.293
Edipresse	68	5.416	92	6.033	4.4	0.077
Axel Springer Suisse (Germany)	68	2.546	96	3.378	5.2	0.104
Neue Zurcher Zeitung	34	4.02	49	4.38	0.05	0.04
ProSiebenSat.1 (Germany)	17	2.26	16	2.28	-1.2	0.00

Media Concentration Index	2004/5	2011 or Most Recent	% Change Annual Average
Public Ownership (%)	18.6	18.1	-0.1% / -0.06
Foreign Ownership (%)	20.0	23.3	0.4/0.41
C4 Average—Weighted	68.2	69.3	0.14
HHI Average—Weighted	2,179	2,677	2.9
C1 Average—Weighted	40	43	0.00
National Power Index	2,115	2,652	3.17%

A lower concentration rate exists in print media, with major firms Tamedia and Ringier with 10% and 8% of the content media market.

p. 382 Swisscom is the main telecom operator and ISP in Switzerland. It holds a 68.3% market share in wireline while in Europe public incumbents are fast losing market share, and it controlled 57.6% of the

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overall platform media market (Table 14.16). Unlike other incumbents such as neighboring Deutsche Telekom, Swisscom has been able to retain a large share of the mobile market (53.1%) against foreign competitors like Orange (France) (and now Iliad, France) and Sunrise (UK) by offering lower prices. Swisscom is a public limited company, with 56.8% of shares belonging to the Swiss Confederation and the rest publicly traded.

Table 14-16. Top Platform Media Companies in Switzerland

	2004/5		2011 or Most Recent		% Change Annual Average	
	Company Power Index in Country	Company Share of the National Platform Media Market (%)	Company Power Index in Country	Company Share of the National Platform Media Market (%)	Company Power Index in Country	Company Share of the National Platform Media Market (%)
Swisscom (56.9% public)	3,840	59.893	3,537	57.620	-0.4	-0.284
Liberty Global (US)	378	9.879	387	10.048	0.29	0.021
Sunrise (TDC, Denmark)	153	10.821	146	8.827	-0.55	-0.249
Orange (France Telecom, France)	106	5.75	109	6.88	0.00	0.14

Media Concentration Index	2004/5	2011 or Most Recent	% Change Annual Average
Public Ownership (%)	34.1	32.8	-0.2/-016
Foreign Ownership (%)	26.5	25.8	-0.1%
C4 Average—Weighted	92.8	90.0	-0.35
HHI Average—Weighted	4,485	4,341	-0.40
C1 Average—Weighted	64	62	0.0%
National Power Index	4,477	4,180	-0.83

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 16. Ibid., p. 10.
 17. Differences between data may be explained by the fact that different sources use different estimation methods. Bookshops that are part of department stores, for example, are not taken into account in company censuses, while their turnovers do appear in VAT statistics. But VAT statistics do not integrate books ordered abroad.
 18. Moreover free magazines distributed by some firms like Migros or Coop are not taken into account.
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