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To:

The Broadcasting and Telecommunications Legislative Review Panel
c/o Innovation, Science and Economic Development Canada
235 Queen Street, 1st Floor
Ottawa, Ontario K1A 0H5

Re: Responding to the New Environment: A Call for Comments

1. The Canadian Media Concentration Research Project (CMCRP) has reviewed the call for comments referred to above, and thanks the Panel for providing this opportunity to submit comments on such an important issue. The CMCRP looks forward to reviewing other parties’ submissions to this process, and, if appropriate, to participating in future phases of this consultation if such should arise.
2. The CMCRP is an independent scholarly research effort supported by funding from the Social Sciences and Humanities Research Council of Canada (SSHRC). It is directed by Dr. Dwayne Winseck, and is based at the School of Journalism and Communication at Carleton University in Ottawa, with contributions from several graduate students, including Ben Klass (Carleton, Agnes Malkinson (Carleton), Lianrui Jia (York/Ryerson), Xiaofei Han (Carleton), Sabrina Wilkinson (Goldsmiths, London).

CMCRP’s mission is to develop a comprehensive, long-term and systematic analysis of the telecoms, internet, and media industries in Canada. In addition, we seek to make this information as widely available to the public as possible, and to contribute to public policy discussions of these issues. More information about the CMCRP can be found at our website, [www.cmcrp.org](http://www.cmcrp.org), including research reports, methodological information, previous policy interventions, as well as open access to the data sets which serve as the foundation for our analysis. Our reports and data sets are also available through the Dataverse, a publicly-accessible repository of scholarly works created and maintained by a consortium of Canadian universities. All works and datasets deposited in Dataverse are given a permanent DOI, so as to not be lost when a website becomes no longer available.

1. The CMCRP’s work is animated by a central question: have telecom, media, and internet markets become more concentrated over time, or less? Our approach to answering this question, and to understanding the implications of the trends it reveals, involves collecting, organizing, and analyzing data on the telecoms, internet, and media industries in Canada – what we refer to collectively as the ‘network media economy.’ In carrying these activities out, we follow what we call the ‘scaffolding approach’—first, concentration data for a dozen or so sectors of the industry is collected on a sector-by-sector basis.[[1]](#footnote-1) We then group these sectors into three relevant categories—network infrastructure, content industries, and online media—which form the basis for comparative analysis. From there, we scaffold upwards to give a portrait of the network media economy as a whole. We use standard measures for assessing industry concentration (i.e. the CR4 and HHI indices), and our data and analysis cover the period from 1984 to the present.
2. The CMCRP produces a series of yearly reports entitled “The Growth of the Network Media Economy in Canada” and “Media and Internet Concentration in Canada.” The most recent reports, which cover the period 1984-2017, were published at the end of 2018, and were updated at the beginning of 2019. These reports are being submitted in full along with this letter. Additionally, the CMCRP recently gave a presentation to the Senate’s Standing Committee on Transport and Communications, which is conducting a parallel review of Canada’s communications legislation. This presentation is also appended. Collectively, these documents represent our input to this review process.
3. We are also providing an executive summary containing a list of the CMCRP reports’ key findings, as well as key recommendations based on our research. It is our hope that doing so, together with submission of the full reports which underpin these findings, will be relevant to and inform the Panel’s review of Canada’s communications legislation.

Sincerely,

Dwayne Winseck

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and Professor, School of Journalism and Communication, Carleton University

Ben Klass,

Research Associate, Canadian Media Concentration Research Project

and Ph.D. student, School of Journalism and Communication, Carleton University

1. The sectors covered by the CMCRP include: wireline telecommunication (i.e. telephone service); wireless telecommunications (i.e. mobile wireless); Internet service providers (ISPs); cable, satellite, & IPTV Distributors (i.e. BDUs); broadcast television; specialty and pay television services; radio; newspapers; magazines; music; over-the-top TV; and internet advertising. [↑](#footnote-ref-1)