



**AMENDMENTS TO
BPA WORLDWIDE BUSINESS PUBLICATION RULES**

BULLETIN B 09-1

MAY 2009

Effective immediately, BPA Worldwide rules are amended as follows. (~~Deleted material is stricken through;~~ **new material is in bold italic typeface.**)

B5.38

A member may claim or imply BPA Worldwide Business Publication Audit authority only for the actual figures, classifications, breakouts, or statements as they appear in BPA Worldwide statements and audit reports. ***Whenever a circulation claim is made which is comprised of both print and electronic copies, such shall be disclosed in the promotion piece. Print Edition and Electronic Edition circulation figures may be reported separately, or may be combined, with a footnote disclosing print copies and electronic copies.*** A publisher may, for the purpose of editorial brevity or clarity, use language similar but not identical to that in a publication's circulation statement or audit report, provided such editorial changes do not affect the type of circulation reported. Should questions arise as to whether such changes are permissible, a determination will be made by the BPA Worldwide President.

B7.5 Arrears (Post-Expire Copies Included In Qualified Paid Circulation)

Subscriptions reported as paid that are retained on the circulation list after their expiration date, for up to 25% of the original term ordered, with a maximum of three months, ***six months for international circulation.*** The numbers of arrears copies over total qualified circulation for the analyzed issue, expressed as a percentage, shall be reported in Paragraph 9 (Five Calendar-Year Analysis) as "Post-Expire Copies included in Total Qualified Circulation."

Multi-copy to the same addressee subscriptions cannot be reported as paid circulation after the expiration dates.

Publications issued on a regular frequency but less often than monthly or have a break in service, e.g., published seasonally, may serve arrears as paid circulation subject to the approval of the President (See B7.31).

Publications issued weekly may use a common monthly expire date. Following this common expiration date, service of arrears is permissible for the full three months.

If a common expire date by month is used by a weekly publication, the following comment shall be included in paragraph 9:

"This publication has a weekly frequency and uses a common expire date in each production month. Therefore, a subscriber may receive one to three additional copies beyond the three months of service permitted as 'Arrears' after the subscription expired, and are not reported as such.

Gift subscriptions may be served copies in arrears as paid circulation for three months after the expiration date for domestic circulation and six months after the expiration date for international circulation.

B7.14 Electronic Editions

Multiple pages of content containing articles, graphics, or other features that are distributed electronically, as a unit and are subject to the rules governing separate Editions and the approval of the President. (Enewsletters and Web sites do not qualify as electronic editions.)

Electronic Editions may be further classified as “Versions” or “Editions.” A Version must include the complete editorial of the original publication, but not the same advertising, layout or pagination. By comparison, a demographic Edition must contain at least 50% common editorial content with the original publication, and a geographic Edition must only have common editorial scope. For either type of Edition, layout, pagination and advertising do not need to be common. (See section B2.4 for additional requirements for Editions.)

Circulation for electronic editions shall be audited to ensure that the systems of the media owner companies and their vendors are in compliance with BPA Worldwide rules and policies before such data can appear on a circulation statement. A special audit may be undertaken to verify the electronic distribution.

The printing and release of an audit report shall be at the media owner’s option. In all audit reports and circulation statements, electronic circulation shall be detailed separately throughout the report. Individuals receiving both the print and electronic edition shall be included only once within Paragraphs 1, 2, 3a, 3b, 3c, 4, and 9.

If an alert to a qualified subscriber (paid and non-paid) is undeliverable, the media owner shall have no more than 90 days to remove said subscriber from their circulation file, or ensure that the delivery details are corrected. (See Sections B7.24, B7.29, B9.13, B9.15, B9.16, B9.22, B9.22, B9.37.5, B9.47, B9.50, B9.73, B10.4.)

Electronic editions with a frequency less than daily may provide the subscriber with an opportunity to “opt-out” of receiving an email alert notification of availability. If a publisher offers an opt-out to receiving the email alert, the publisher shall separately offer an opt-out of receiving the electronic magazine. Subscribers who opt-out of receiving the email alert but have not opted-out of receiving the electronic edition, need not receive an alert to be reported as qualified distribution. All others must receive an alert for each issue.

Electronic editions with a daily frequency may provide the subscriber with the option to “opt-in” to receiving an email alert of availability. An email alert is not required for publications with a daily frequency.

Electronic non-qualified advertiser and advertiser agency copies and non-qualified paid electronic copies (excluding sponsored) may be reported on the BPA worldwide circulation statements, and audit reports. ~~all other non-qualified electronic edition copies shall not be reported on BPA Worldwide circulation statements and audit reports.~~

Only one copy of an electronic edition may be considered qualified circulation per single addressee. Electronic Edition Site Licenses and Seats (individuals) served as part of the license shall not be reported as qualified circulation. A publisher may disclose the number of electronic edition site licenses and authorized seats, including paid and non-paid data, demographic data, license source and age data, and geographic data, using standard BPA Worldwide tables. Reporting the name of the company to which the content has been licensed shall be optional. Licenses may be reported for definitive amounts only, “global” or “companywide” license agreements may not be reported. Qualified circulation and site license seats may not be summed on the BPA reports.

B7.26 Non-Qualified Circulation

That circulation which does not conform to the field served and definition of recipient qualification. This distribution is reported on the first page of the circulation statement.

Electronic edition circulation that meets the qualification criteria stated in the Field Served and the Definition of Recipient Qualification, but has not been requested (personal or company) or served as a benefit of membership shall be reported as non-qualified circulation as "Electronic Editions". Evidence of conformance to the Field Served and Definition or Recipient Qualification shall be reported in the Additional Data table at the end of the BPA report. Without the reporting of the conformance, the copies may not be claimed as circulation.

B7.29 Qualified Circulation

That circulation for which the mailing address conformance to the Field Served and Definition of Recipient Qualification, and correct classification in Paragraph 3a, are verified by auditable documentary evidence dated as shown in Paragraph 3b of the circulation statement. (Reporting Paragraph 3b is required for non-paid circulation and optional for paid circulation.)

For circulation to be identified as qualified "Continuous" circulation, publications shall serve recipients at least three months of continuous service of the publication, subject to normal removals and additions. Up to 5% of total qualified circulation may be served less than three months without further disclosure; over 5% must be reported as non continuous circulation (see 7.36)

Normal addition and removal activity includes removing subscribers that indicate they no longer wish to receive the publication and non deliverable addresses.

When publications report separate Editions in Paragraph 2, this rule shall be applied separately to each Edition.

Individuals receiving copies of an electronic version may only be considered as qualified circulation if such copies are elicited either through personal or company request, or a non-deductible benefit-of-membership subscription (See section 7.9). ***Publishers may convert "requested" print edition subscriptions to electronic edition subscriptions, provided the subscriber who requested the publication receives advance notice of the conversion and is given the option to refuse the conversion. Evidence of the original request and the notice of the conversion shall be available at the time of audit.***

B9.14 Average Non-Qualified Circulation

Shall report the distribution for the period covered in the following categories:

- Advertiser and agency.
- Electronic Editions.***
- Rotated or occasional.
- Allocated for shows and conventions.
- All other.

Any unsold or returned copies intended for single copy sales shall not be included in Average Non-

Qualified Circulation. Unsold or returned copies are not included in BPA reports.

Electronic non-qualified advertiser and advertiser agency copies and non-qualified paid electronic copies (excluding sponsored) may be reported on the BPA worldwide circulation statements, and audit reports; all other non-qualified ***non-requested*** electronic ***edition*** publication copies shall not be reported on BPA Worldwide circulation statements and audit reports.

B9.20 Paragraph 2a, Website Activity By Month

Publishers reporting audited website traffic on-line through "BPA Interactive powered by Nielsen Online," shall report the monthly audited website traffic data on circulation statements and audit reports. The following metrics shall be reported: Page Impressions, User Sessions, Unique Browsers, Unique Browser Frequency, Page Duration and User Session Duration. The average figures reported are calculated by summing the web traffic for each month and dividing the total by the number of months reported.

B9.36.1

On the interim circulation statement, qualification figures for paragraph 3b for continuous circulation may be obtained by repeating the percentages for the continuous circulation from the latest audit report and applying them to the qualified circulation for the issue analyzed for the interim statement to arrive at the total continuous copies for each source. This option is only available when the total qualified circulation for the issue analyzed in the interim circulation statement is less than 10% above the total qualified circulation for the issue analyzed in the latest audit report. **If the total qualified circulation for the issue analyzed in the interim circulation statement has increased by 10% or more due to a merger of publications during the reporting period, the publisher may elect to report actual figures for the interim circulation statement or omit the paragraph for the interim circulation statement. If the publisher chooses to omit the paragraph the following footnote is required, "Due to a merging of publications during the reporting period paragraph 3b cannot be projected and has not been reported. Paragraph 3b will be reported in the subsequent circulation statement."**

B9.37

The following schedule of sources of qualification shall be listed in Paragraph 3b:

- I. ~~Personal Direct Request From the Recipient~~.....
- II. Request From Recipient's Company.....
- III. Membership Benefit.....
- IV. Communication From Recipient or Recipient's Company
(other than request)
- V. Total Sources other than above (listed alphabetically)
Association rosters and directories.....
Business directories
- Manufacturer, distributor and wholesaler lists.....
Other sources.....
- VI. Single Copy Sales.....

Publishers may report written, telecommunication, and electronic request at their option.

PLEASE NOTE: All references to "Personal Direct Request from the Recipient" have been changed to "Direct Request" throughout the rules."

B9.44

The initial reporting of the mailing address breakout for paragraph 3c shall be in an audit report. A publisher has the option of issuing a revised circulation statement incorporating the paragraph 3c data; however, the revised statement shall be released simultaneously with, or after, the audit report. Thereafter, new figures for paragraph 3c are required, at least annually, concurrent with the end of the publication's audit year.

The new data for paragraph 3c shall appear in the second circulation statement and in the 12-month audit report.

On the interim circulation statement, figures for paragraph 3c may be obtained by repeating the percentages from the latest audit report and applying them to the qualified circulation for the issue analyzed for the interim statement to arrive at the total copies in each breakout.

This option is only available when the total qualified circulation for the issue analyzed in the interim circulation statement is less than 10% above the total qualified circulation for the issue analyzed in the latest audit report. ***If the total qualified circulation for the issue analyzed in the interim circulation statement has increased by 10% or more due to a merger of publications during the reporting period, the publisher may elect to report actual figures for the interim circulation statement or omit the paragraph for the interim circulation statement. If the publisher chooses to omit the paragraph the following footnote is required, "Due to a merging of publications during the reporting period paragraph 3c cannot be projected and has not been reported. Paragraph 3c will be reported in the subsequent circulation statement."***

A publisher may report new figures in paragraph 3c in the interim circulation statement if new figures are obtained from a mailing list which shall be subject to audit.

B9.52.2

This paragraph shall separately report the gross number of qualified paid subscriptions sold during the period by prices and term in sequence of descending percentage of orders sold except for "All Others" which shall always be reported last. Only offers representing 5% or more of subscription sales for the period shall be disclosed showing the quantity of orders and percent of total orders. If "all others" represents 20% or more of the orders for the period, the average price of "all other" orders shall be reported.

Subscriptions sold on a renew until forbid basis with no fixed term, which are billed periodically throughout the year, without any renewal notification, shall be reported separately as "Perpetual subscribers (see note)." The publisher shall disclose the rate and terms of the perpetual subscriptions.

B9.72

Publications may report non-qualified electronic edition copies that meet the qualification criteria stated in the Field Served and Definition of Recipient Qualification, but have not been requested (personal or company) or served as a benefit of membership, in paragraph 9, Additional Data. Proof of production, distribution and demographic data shall be provided at the time of audit. (See B7.29)

B10.32.1

Association/Society or Club etc. membership lists, manufacturers' or distributors' lists of customers, prospects and licensees are acceptable evidence of qualification providing such lists are adequately identified and dated to satisfy the auditor of their authenticity and acceptability. ***If the executive director of an Association/Society or Club requests subscriptions for their members, the subscription request may be disclosed in a footnote in paragraph 9, Additional Data.***



AMENDMENTS TO BPA WORLDWIDE CONSUMER MAGAZINE RULES

BULLETIN C 09-1

MAY 2009

Effective immediately, BPA Worldwide rules are amended as follows. (~~Deleted material is stricken through;~~ **new material is in bold italic typeface.**)

C5.38

A member may claim or imply BPA Worldwide Consumer Magazine Audit authority only for the actual figures, classifications, breakouts, or statements as they appear in BPA Worldwide statements and audit reports. ***Whenever a circulation claim is made which is comprised of both print and electronic copies, such shall be disclosed in the promotion piece. Print Edition and Electronic Edition circulation figures may be reported separately, or may be combined, with a footnote disclosing print copies and electronic copies.*** A publisher may, for the purpose of editorial brevity or clarity, use language similar but not for identical to that in a magazine's circulation statement or audit report, provided such editorial changes do not affect the type of circulation reported. Should questions arise as to whether such changes are permissible, a determination will be made by the BPA Worldwide President.

C7.3 Arrears (Post-Expiration Copies Included In Qualified Paid Circulation)

Subscriptions reported as paid that are retained on the circulation list after their expiration date, for up to 25% of the original term ordered, with a maximum of three months, ***six months for international circulation.***

Post-expiration copies, if served, must be distributed prior to the distribution of the next regularly scheduled issue.

An average number of arrears copies for the period, expressed as a percentage, shall be reported in Paragraph 7 (Five Calendar-Year Analysis) as Post-Expire Copies Included in Total Qualified Circulation.

Multi-Copy Same Addressee and Public Place subscriptions cannot be reported as paid circulation after the expiration dates.

Magazines issued on a regular frequency but less often than monthly, and magazines that have a break in service (e.g., published seasonally), may serve arrears as paid circulation, subject to the approval of the President (See C7.23).

Magazines issued weekly may use a common monthly expire date. Following this common expiration date, service of arrears is permissible for the full three months.

If a common expire date by month is used by a weekly magazine, the following comment shall be included in Paragraph 8, referencing Paragraph 7:

“This magazine has a weekly frequency and uses a common expire date in each production month. Therefore, a subscriber may receive one to three additional copies beyond the three months of service permitted as ‘arrears’ after the subscription expired. These additional copies are not reported as arrears.”

Gift subscriptions may be served copies in arrears as paid circulation for three months after the expiration date for domestic circulation, and six months after the expiration date for international circulation.

C7.10 Electronic Editions

Multiple pages of content containing articles, graphics, or other features that are distributed electronically, as a unit, and are subject to the rules governing separate Editions and the approval of the President. (Enewsletters and Web sites do not qualify as electronic magazines.)

Electronic Editions may be further classified as “Versions” or “Editions.” A Version must include the complete editorial of the original magazine but not the same advertising, layout or pagination. By comparison, a demographic Edition must contain the same editorial content, with only such variations in editorial matter required by the different demographic or geographic audience(s) being served. For either type of Edition, layout, pagination and advertising do not need to be common. (See C2.14 for additional requirements for Editions.) Circulation for electronic editions shall be audited to ensure that the systems of the media owner and their vendor(s) are in compliance with BPA Worldwide rules and policies before such data can appear on a circulation statement. A special audit may be undertaken to verify the electronic distribution. The printing and release of an audit shall be at the media owner’s option.

In all audit reports and circulation statements, electronic circulation shall be detailed separately throughout the report. Individuals receiving both the print and electronic edition Versions shall be included only once within Paragraphs 1, 2, 4, 5, 6 and 7.

If an alert to a qualified subscriber (paid and non-paid) is undeliverable, the media owner shall have no more than 90 days to remove said subscriber from their circulation file, or ensure that the delivery details are corrected. (See C7.19, C9.9, C9.18, C9.19, C9.35, C9.39, C10.4.)

Electronic Editions with a frequency less than daily may provide the subscriber with an opportunity to “opt-out” of receiving an email alert notification of availability. If a publisher offers an opt-out to receiving the email alert, the publisher shall separately offer an opt-out of receiving the electronic magazine. Subscribers who opt-out of receiving the email alert but have not opted-out of receiving the electronic publication, need not receive an alert to be reported as qualified distribution. All others must receive an alert for each issue.

Electronic Editions with a daily frequency may provide the subscriber with the option to “opt-in” to receiving an email alert of availability. An email alert is not required for publications with a daily frequency.

Electronic non-qualified advertiser and advertiser agency copies and non-qualified paid electronic copies (excluding sponsored) may be reported on the BPA worldwide circulation statements, and audit report.
~~all other non-qualified electronic edition copies shall not be reported on BPA Worldwide circulation statements and audit reports.~~

Only one copy of an electronic edition may be considered qualified circulation per single addressee. Electronic Edition Site Licenses and Seats (individuals) served as part of the license shall not be reported as qualified circulation. A publisher may disclose the number of electronic edition site licenses and authorized seats, including paid and non-paid data, demographic data, license source and age data, and geographic data, using standard BPA Worldwide tables. Reporting the name of the company to which the content has been licensed shall be optional. Licenses may be reported for definitive amounts only, “global” or “companywide” license agreements may not be reported. Qualified circulation and site license seats may not be summed on the BPA reports.

C7.21 Non-Qualified Circulation

That circulation which fails to conform to the terms of the Market Served statement on the front page of the circulation statement and the audit report.

This distribution is reported on the back page of the circulation statement as "Average Non-Qualified Circulation" and includes the following:

Advertiser and Agency Copies, Rotated or Occasional Copies, Copies for Conventions and Trade

Shows (unless claimed as Qualified Circulation), and All Other copies printed, with the exception of Single-Copy Sales returns.

Non-Qualified Circulation shall be reported as an aggregate figure, or, at the option of the publisher, these categories may be reported separately.

Non-qualified copies distributed by the publisher's salespeople to prospects are reported within Paragraph 8 of the circulation statement as Advertiser and Agency Copies.

Non-qualified copies distributed at trade shows or conventions may be reported as Allocated for Trade Shows and Conventions if adequate distribution documentation is available for audit. Otherwise, these copies are reported as All Other.

Electronic edition circulation that meets the qualification criteria stated in the Market Served, but has not been requested (personal or company) or served as a benefit of membership shall be reported as non-qualified circulation as "Electronic Editions". Evidence of conformance to the Market Served shall be reported in the Additional Data table at the end of the BPA report. Without the reporting of the conformance, the copies may not be claimed as circulation.

Electronic non-qualified advertiser and advertiser agency copies and non-qualified paid electronic copies (excluding sponsored) may be reported on the BPA worldwide circulation statements, and audit reports; all other non-qualified, non requested electronic edition copies shall not be reported on BPA Worldwide circulation statements and audit reports.

C7.25 Qualified Circulation

That circulation for which the mailing address, conformance to the Market Served, and correct classification in Paragraph 4 are verified by auditable documentary evidence, dated as shown in Paragraph 5 of the circulation statement. (Reporting in Paragraph 5 is required for non-paid circulation and optional for paid circulation.)

For circulation to be identified as qualified "Continuous" circulation, publications shall serve recipients at least three months of continuous service of the publication, subject to normal removals and additions. Up to 5% of total qualified circulation may be served less than three months without further disclosure; over 5% must be reported as non continuous circulation (see C7.32 Rotated Distribution)

Normal addition and removal activity includes removing subscribers that indicate they no longer wish to receive the publication and non deliverable addresses.

Individuals receiving copies of an electronic Version may only be considered as Qualified Circulation if such copies are elicited either through personal, or company request, or as a non-deductible Benefit-of-Membership subscription. (See C7.7.) ***Publishers may convert "requested" print edition subscriptions to electronic edition subscriptions provided the subscriber who requested the magazines receives advance notice of the conversion and is given the option to refuse the conversion. Evidence of the original request and the notice of the conversion shall be available at the time of the audit.***

C9.20 Paragraph 2a, Website Activity By Month

Publishers reporting audited website traffic on-line through “BPA Interactive powered by Nielsen Online” shall report the monthly audited website traffic data on their circulation statements and audit reports. The following metrics shall be reported: Page Impressions, User Sessions, Unique Browsers, Unique Browser Frequency, Page Duration, and User Session Duration. The average figures reported are calculated by summing the web traffic for each month and dividing the total by the number of months reported.

C9.22

Paragraph 3a (Prices) – Shall report the “Average Annual Order Price.” Average price shall be calculated by totaling the gross dollar value of all orders received during the reporting period (inclusive of promotional incentives but exclusive of all sponsorship orders, whether Individual, Multi-Copy or Public Place), and dividing this total by the gross total number of copies ordered (exclusive of all Sponsorship orders, whether Individual, Multi-Copy or Public Place). The resulting average unit price is then multiplied by the basic annual term, to yield the average subscription price for the period.

When multiple currencies are collected, the publisher shall convert the multiple currencies into one home currency of choice in order to compute Average Annual Order Price.

(For determining average annual price for Combination Sales, see C7.8.)

Paragraph 3a shall separately report the gross number of Qualified Paid subscriptions sold during the period by prices and terms, in sequence of descending percentage of orders sold that are yielded from offers representing 5% or more of subscription sales for the period (except for “All Others,” which shall always be reported last). However, no Sponsored circulation of any type shall be included in the calculation of average price, and this shall be noted. Nor are Sponsored orders to be itemized by price and term. Rather, the total Sponsored orders received during the period (including Multi-Copy and paid Public Place) shall be reported as a one-line figure which, when added to the reporting of all other orders, shall yield the grand total orders received for the period.

If paid copies under “All Others” represent 20% or more of the orders for the period, the average price of “All Other” orders shall also be reported.

Subscriptions sold on a renew until forbid basis with no fixed term, which are billed periodically throughout the year, without any renewal notification, shall be reported separately as “Perpetual subscribers (see note).” The publisher shall disclose the rate and terms of the perpetual subscriptions.

Subscriptions sold on the basis of acceptance of redemption of affinity program points (e.g., frequent flyer miles, loyalty points, etc.) as payment, shall disclose the details of the offer, including the subscription price, redemption value of a point, and points redeemed, in Paragraph 8. These shall also be cross-referenced to Paragraph 3a.

C9.37

The initial reporting of Qualified Circulation figures for Paragraph 5 shall be in an audit report. Thereafter, new figures for Paragraph 5 are required at least annually, concurrent with the end of the magazine's audit year.

The new data for Paragraph 5 shall appear in the second circulation statement and in the twelve-month audit report. On the interim circulation statement, qualification figures for paragraph 5 for Continuous circulation may be obtained by repeating the percentages for Continuous circulation from the latest audit report and applying them to the Qualified Circulation for the issue analyzed for the interim statement, to arrive at the total Continuous copies for each source.

This option is available only when the total Qualified Continuous circulation for the issue analyzed in the interim circulation statement is less than 10% above the total Qualified Continuous circulation for the issue analyzed in the latest audit report. ***If the total qualified circulation for the issue analyzed in the interim circulation statement has increased by 10% or more due to a merger of magazines during the reporting period, the publisher may elect to report actual figures for the interim circulation statement or omit the paragraph for the interim circulation statement. If the publisher chooses to omit the paragraph the following footnote is required, "Due to a merging of magazines during the reporting period paragraph 5 cannot be projected and has not been reported. Paragraph 5 will be reported in the subsequent circulation statement."***

If a publication conducts a special six-month audit to change the audit year-end period (cycle), interim circulation data may only be projected from a printed/posted audit report.

A publisher may report new figures in Paragraph 5 in the interim circulation statement if new figures are obtained from a label printout count, which shall be subject to audit.

Magazines reporting Qualified Continuous and Qualified Non-Continuous circulation shall require separate Paragraph 5 analyses. At the publisher's option, a combined summary table may be provided. The percentages in each table should add to 100%.

Magazines reporting print and electronic Versions shall report such circulation in the following columns:

- Print Version Only
- Electronic Version Only
- Both Print and Electronic Versions (if applicable)

If applicable, the column "Both Print and Electronic Versions" shall include each subscriber only once. The classifications for such subscribers shall be chosen by the publisher, as long as the print source is Personal Direct Request or Request from Recipient's Company.

If the print sources something other than Personal Direct Request or Request from Recipient's Company, the electronic source shall be used. (See C7.10.)

The following schedule of sources of qualification shall be listed in Paragraph 5:

C9.38

- I. ~~Personal Direct Request From the Recipient~~.....
- II. Request From Recipient's Company
- III. Membership benefit.....
- IV. Communication From Recipient or Redistributors (other than request)..
- V. Total Sources other than above (listed alphabetically)
Rosters and directories.....
Manufacturer, distributor and wholesaler lists

Other source.....

Publishers may report written, telecommunication, and electronic request at their option.

<p><i>PLEASE NOTE: All references to "Personal Direct Request from the Recipient" have been changed to "Direct Request" throughout the rules.</i></p>
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C9.58

Average Non-Qualified Circulation

This distribution shall be reported as a total figure and includes the distribution for the period of the following:

Advertiser and Agency Copies;

Electronic Editions;

Non-Qualified Paid;

Rotated or Occasional Copies;

Copies for Conventions and Trade Shows, (if NOT reported as qualified);

and all other copies printed with the exception of single copy sales returns.

At the option of the publisher, these categories may be reported separately.

If single copy sales are reported, the following comment must be included, "Average non-qualified circulation excludes single copy sale returns."

Electronic non-qualified advertiser and advertiser agency copies and non-qualified paid electronic copies (excluding sponsored) may be reported on the BPA worldwide circulation statements, and audit reports; all other non-qualified **non-requested** electronic **edition** publication copies shall not be reported on BPA Worldwide circulation statements and audit reports.

C9.63

Publications may report non-qualified electronic edition copies that meet the qualification criteria stated in the Market Served, but have not been requested (personal or company) or served as a benefit of membership, in paragraph 9, Additional Data. Proof of production, distribution and demographic data shall be provided at the time of audit. (See C7.25)

C10.30.1

Association/Society or Club etc. membership lists, manufacturers' or distributors' lists of customers, prospects and licensees are acceptable evidence of qualification providing such lists are adequately identified and dated to satisfy the auditor of their authenticity and acceptability. ***If the executive director of an Association/Society or Club requests subscriptions for their members, the subscription request may be disclosed in a footnote in paragraph 9, Additional Data.***



AMENDMENTS TO BPA WORLDWIDE NEWSPAPER RULES

BULLETIN N 09-1

MAY 2009

Effective immediately, BPA Worldwide rules are amended as follows. (~~Deleted material is stricken through;~~ **new material is in bold italic typeface.**)

N7.20 Initial Audit Report

May be released for any consecutive three or six-month period. A newspaper shall transfer to the standard six-month reporting periods ended ~~March~~ **June** or ~~September~~ **December** with its first Circulation Statement following the initial audit and include whatever issues were previously audited during the period reported. (See N8.5).

N8.5

Publisher Members - BPA Worldwide Newspaper Audit Members will release two Circulation Statements each year for the six months ended ~~March~~ **June** and for the six months ended ~~September~~ **December**.

The six-month statements will be checked and released as Circulation Statements upon receipt and completion of processing. The Circulation Statements form the basis for the Audit Report. The audit will be completed after the auditor's examination of the publisher's records. Audit Report (See N7.4)

The audit will be made in the publisher's office and/or wherever the records can be properly checked.

A newspaper applicant, which has chosen a period ended with a month other than ~~March~~ **June** or ~~September~~ **December** for its initial Audit Report, shall transfer to the standard ~~March~~ **June** or ~~September~~ **December** schedule with its first Circulation Statement following the initial Audit Report and include whatever previously audited issues are necessary to complete the six month period.

N9.16 Paragraph 5: Analysis of Circulation

Shall contain a breakout of a specific issue for Community and Ethnic Newspapers. The breakout for Daily Newspapers can be for a specific issue or the average of the statement period.

The specific issue shall be any issue in ~~February~~ **May** on the ~~March~~ **June** Circulation Statement and any issue in ~~August~~ **November** on the ~~September~~ **December** Circulation Statement.

~~In the GCC States of Bahrain, Kuwait, Oman, Qatar, Saudi Arabia and United Arab Emirates, the specific issue shall be any issue in February or March on the March Circulation Statement and any issue in August or September on the September Circulation Statement.~~

When averages of issues are reported in separate columns in paragraph 1, the same issue groupings shall each be reported in paragraph 5.

N9.19 Paragraph 8: Arrears under three months

Shall report the number of paid subscribers in arrears as of the issue analyzed in paragraph 5.

If paragraph 5 analyses the average for the period, the arrears shall be as of any issue in ~~February~~ **May** on the ~~March~~ **June** Circulation Statement and shall be as at any issue in ~~August~~ **November** for the ~~September~~ **December** Circulation Statement.

N10.2 Special Three or Six Month Audit

A newspaper may request the President to provide a special three or six month audit ending with a month other than ~~March~~ **June** or ~~September~~ **December**, if in the President's judgment, circumstances warrant the audit and the newspaper meets the following conditions:

The newspaper's request for the special three or six month audit shall be in writing explaining the reason for the audit.

The newspaper shall pay a regular auditing charge for the special audit.

A newspaper, which has chosen a period ending with a month other than ~~March~~ **June** or ~~September~~ **December** for its special three or six month Audit Report, shall transfer back to the standard ~~March~~ **June** or ~~September~~ **December** schedule with its first Circulation Statement following the special three or six month Audit Report, and include whatever previously audited issues are necessary to complete the six month period.

The newspaper may continue to audit on its original audit cycle, or, with approval of the President, the audit cycle may be changed.



AMENDMENTS TO CCAB CANADIAN DAILY NEWSPAPER RULES

BULLETIN DN 09

MAY 2009

Effective immediately BPA Worldwide rules are amended as follows. (~~Deleted material is stricken through;~~
new material is *in bold italic typeface.*)

DN7.12 Educational

All educational copies, including but not limited to classroom, university and language programs shall be reported as "sponsored by third party or free, educational," in paragraph one.

In cases when educational copies are not supported by invoicing and corresponding proof-of-payment, copies must be supported by an agreement indicating the location acknowledges accepting the newspaper for redistribution. The agreement can either be in written, telecommunication, or electronic format. To verify the request, written agreements must be signed and dated; telecommunication agreements must be recorded; electronic agreements must contain the answer to a personal identifying question to which only the subscriber would know the answer. All must be made available to the auditor upon request.

Agreements from a school board shall be permitted. The document shall include the list of schools where the copies are to be distributed, with full address, telephone number, the quantity per location, and the contact person at each location.

DN7.27 Occasional Subscriptions

Occasional service is the delivery of issues not specifically identified as part of a new or renewed subscription. ***Occasional service is not permitted for consecutive days.***

Occasional service must be offered to all eligible subscribing households within a market. All households scheduled to receive occasional subscription service must be notified at least fourteen days prior to the distribution date. Notification may be placed in the newspaper. If the publisher chooses to notify through the newspaper the notification must appear on a day that the subscriber receives the newspaper.

When occasional service equals or exceeds sixteen days in an annual twelve-month audit report, (eight days on a six-month audit report, and four days on a three-month audit report) "average occasional service" will be reported as a separate line item in Paragraphs 1 of the Audit Report, as "Home Delivery, Occasional Service."

When average occasional service is reported, information as to the specific dates the occasional service occurred, and the increase in paid circulation resulting for each of the dates must be disclosed in paragraph 6.

DN7.34 Qualified Paid Subscription Circulation

That circulation which is not for resale, meets the above definition for qualification and the requirements listed below.

Subscription payment orders shall conform to the following conditions:

It may be paid for at any price, and shall not be free of charge.

Payment shall not be delinquent for more than three months after the beginning of the subscription service, see "credit subscriptions."

A subscription sold on a "renew until forbid" basis may be reported as paid circulation until the subscriber cancels

Subscriptions sold with a promotional incentive must collect payment greater than the full value of the promotional incentive. ***The value of the promotional incentive must be subtracted from the offer to determine if the subscription is considered "paid at, or above, 50% of basic" or "paid below 50% of basic".***

Subscriptions sold with an advertising contract shall be paid in addition to the regular advertising contract; and shall give the advertiser the option of deducting the subscription price from the contract if they do not wish to receive the newspaper.

Subscriptions sold via the redemption of affinity program points, e.g. frequent flyer miles, loyalty program points, etc., shall adhere to the following:

- Participants shall elect to participate in the program;

The earning of miles, points, etc., shall be transaction based. For example, points earned for credit card purchase/borrowing activity and purchase of air travel, hotel stays, or car rentals, etc. qualify. Points earned without transaction activity (no financial transaction occurs) do not qualify for redemption as paid circulation;

- Points shall be accruable towards future redemption's;
- Points awarded upon enrollment shall be less than 50% of the lowest valued product/service offered in the program;
- All affinity point programs shall offer non-newspaper products/services. Newspapers may not represent more than 75% of each program.
- The value of all products and services shall be disclosed, in both monetary values and points.
- The value of non-newspaper products/ services shall be equal to or greater than the lowest valued newspaper.
- The redeemable units of measure, e.g. miles, shall have a recognizable and accepted monetary value.
- Adequate documentation of the transfer or redemption of the units of measure, e.g. frequent flyer miles, shall be made available to the audit staff.
- The President shall have final approval of all affinity programs prior to acceptance for use in obtaining qualified paid circulation.

DN7.39 Sponsored/Third-Party Circulation

Circulation purchased by a sponsor/donor and which conforms to the definition of qualified circulation shall be reported as sponsored by third party or free, throughout the report.

Individually Addressed Subscriptions purchased in lots of 6 or more that promote the interests of the sponsor/donor and that otherwise conform to the definition of Qualified Circulation shall be reported as "Sponsored by Third Party or Free" circulation.

Individually addressed subscriptions purchased in lots of 5 or fewer that promote the interests of the sponsor/donor and that otherwise conform to the definition of qualified paid circulation shall be reported as "paid for by individual recipient" circulation. ***When a corporate franchisor purchases copies on behalf of franchisees, individual franchisee locations receiving 5 or fewer copies will be claimed as "paid for by individual recipient." These copies are intended to be made available to patrons of a franchisee's location for on premise reading, and not intended to be combined with store purchases.***

DN7.40 Subscription Conversions

Subscriptions based upon the premise that an offer has been accepted unless declined, qualify as paid circulation if money has been received to qualify the original subscription.

The subscriber must be notified of the conversion and must be given the opportunity to opt out of the conversion. The conversion is limited to the length and term offered/disclosed to the subscriber in the notification. ***Conversion copies may be served print editions or electronic editions.***

Converted copies shall be disclosed in paragraph 6 as follows:

The number of subscribers converted to the new frequency; the effective date of the change; and the geographic market area in which the change took place.