Television Across Europe

A Comparative Introduction

Jan Wieten

Graham Murdock

Peter Dahlgren

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Edited by

Jan Wieten,

Graham Murdock

and Peter Dahlgren

CONTENTS

Marit Bakke is professor at the Department of Media Studies, Universitetet i Bergen (University of Bergen), Norway, and a member of the Euro-Media Research Group.

Kees Brants holds positions at the Department of Communication, Universiteit van Amsterdam (University of Amsterdam) and the Universiteit Leiden (Leyden University) where he is professor of political communication. He is a member of the Amsterdam School of Communications Research (ASCoR) and the Euro-Media Research Group.

Peter Dahlgren is professor of Media and Communication Studies at Lunds Universitet (Lund University), Sweden.

Els De Bens is Professor of Communication Science and Dean of the Faculty of Political and Social Sciences at the Universiteit Gent (University of Ghent), Belgium, and is a member of the Euro-Media Research Group.

Gust De Meyer is senior associate professor at the Department of Communication, Katholieke Universiteit Leuven (The Catholic University Leuven), Flanders, Belgium.

Taisto Hujanen is professor of Electronic Media at the Department of Journalism and Mass Communication, Tampereen Yliopisto (University of Tampere), Finland.

Aurélie Laborde is researcher in information and communication at Université Michel de Montaigne – Bordeaux 3 (Michel de Montaigne University Bordeaux), France.

Greg McLaughlin lectures in Media Studies at the University of Ulster's Coleraine campus.

Albert Moran is senior fellow at the School of Film, Media and Cultural Studies at Griffith University, Brisbane, Australia.

Graham Murdock is reader in the Sociology of Culture at the Department of Social Sciences, Loughborough University, United Kingdom.

Sari Näsi has been research assistant at the Department of Communication, Universiteit van Amsterdam (University of Amsterdam), The Netherlands, and general assistant to the European Module project. She now works for 'Observer Finland' in Helsinki.

Michel Perrot is professor of Media Sociology and Intercultural Communication at the Université de Michel de Montaigne, Bordeaux 3 (Michel de Montaigne University Bordeaux), France.

Keith Roe is professor at the Department of Communication, Katholieke Universiteit Leuven (The Catholic University Leuven), Flanders, Belgium.

Winfried Schulz holds the Chair in Mass Communication and Political Science at the Friedrich-Alexander Universität Erlangen-Nürnberg (University of Erlangen-Nuremberg), Germany.

Jan Wieten is senior associate professor at the Department of Communication, Universiteit van Amsterdam (University of Amsterdam), The Netherlands, and member of the Amsterdam School of Communications Research (ASCoR).

As teachers and researchers of the media at European universities, the editors and authors of this coursebook have over the years felt a growing need for a textbook that would address contemporary developments in television from a European perspective. So much of the available current literature on broadcasting takes as its point of departure the existing system in the United States. While this is immensely important and relevant not least in a global context, we have long felt the lack of a text that is grounded in the particular histories and circumstances of television in Western Europe. Further, we have also come to see the importance of a comparative approach: there is much that unites the character and evolution of television in Western Europe, yet television within each country has its own particular features. Many of these features are significant, yet may be so self-evident they can readily be missed. Cultivating a comparative view helps make visible that which is easily taken for granted.

THE GOALS OF THE BOOK

For practical reasons we restrict ourselves in this book to the Europe that is associated with the original system of public service broadcasting and now with hybrid (mixed) broadcasting systems. There is of course much that can be said about television in the post-communist societies of East and Central Europe – not to mention other parts of the world – but in this book our focus is on the television of the countries and region to which we ourselves belong. This focus also means that we are looking specifically at television, and will not say too much about radio, although many of the general observations we make about 'broadcasting' will often be of relevance for radio as well. It is a coursebook for

undergraduate university students in media and communication studies, and related fields, which should also be of interest to students in European Studies and similar areas. Our basic intent here is to enhance the student's *knowledge and understanding* of television. We do this by presenting materials that will provide an *introductory orientation* to television in Western Europe generally, with specific details from several countries.

Further, it is our aim that students will be able to use the book to *conceptually clarify* the factors that have been shaping television's development, and also to help them to *analyse the issues* that are at stake in its future. Finally, we hope the book will serve as a resource for *probing further* particular topics of individual or group interest. We can add that it is our assumption – and it has been our experience – that deepened insight into the television medium will not undermine one's enjoyment of it, but rather enhance it. In this book we do not seek to duplicate the publications of various research efforts to chart these developments – most notably the work of the Euro-Media Research Group[1] – though we certainly make use of such material, as well as our own work and that of other researchers.

The societies and cultures of Western Europe have been undergoing changes in the post-war period, and television has been both a reflection and a catalyst of those changes. Western Europe is thus our historical *setting*, the context for our examination of television. Television is a *medium*, a technology of communication, but it is also an *institution*, an organized societal construction, that is subject to formal and informal controls and influences. Television remains the dominant medium of modern society, continuing to expand in the abundance of its output. As an institution it has both *symbolic* and *material* aspects. The symbolic aspect of television has to do with its output, its representations, including fiction, non-fiction, entertainment, sports, and so forth. It stands at the centre of both popular culture and of the coverage of current affairs. One can say that television is the single most important institution shaping the symbolic environment in which we live (and think and dream). The nature of its output is thus of great social and cultural significance. At the same time, television is a major economic under-taking, a material enterprise of considerable cost; that also has enormous economic consequences for society, not least via its advertising. It should be no surprise that there are various social and economic actors who have vested interests in television.

TELEVISION – AND SOCIETY – IN TRANSITION

Until the 1980s the distinguishing feature of broadcasting in most of Western Europe (as compared to the US) was that it was highly regulated

in the form of public broadcasting monopolies. At the beginning of the 21st century the organization of broadcasting in Europe is still easily distinguished from the predominantly commercial system in the United States. Public service broadcasting has not been replaced by commercial broadcasting in the major upheaval since the 1980s, but public and commercial broadcasting have come to exist side by side, in a new equilibrium. Dual broadcasting systems are now the most common organizational form in Europe and competition, not between commercial networks only as in the US, but between public and commercial television is one of the main factors shaping broadcasting in Europe.

It is not only the dialectical relationship between public and commercial arrangements that one is confronted with when studying changing television in a changing Europe. Europe itself is full of contradictions. European unity exists in the form of the European Union (EU) yet the region is still characterized by a multiplicity of nation states. There is one large, EU market, but an immense cultural heterogeneity. We find considerable linguistic diversity and at the same time a dominance of the lingua franca of our days, English. Europe, like the rest of the world today, manifests in compelling ways both global and local trends. Looking at the media, one could further argue that we witness today a relatively uniform European or Anglo-American mass media culture, while we increasingly find multicultural nation states. Our identities as citizens are becoming more problematic, not least in relationship to our identities as consumers. Mass consumption prevails, yet marketing and advertising aims at ever smaller target groups. We have access to more and more television channels, yet the diversity of the programming seemingly does not increase.

Talking about Europe, especially in the field of media, means talking about the ambiguous relationship between Europe and America, about Americanization. Over two decades ago, Caroline Heller, in *Broadcasting and Accountability*, wrote: 'Throughout the history of radio and television [in Britain] the American example has provided an immensely influential devil's advocacy of alternatives: hellfire accounts of chaos and tastelessness, stirring images of freedom, enterprise and imagination' (London: British Film Institute, 1978: 12). This observation is no less true today: television in Europe is still trying to come to terms with American television.

USING THIS COURSEBOOK

Writing a coursebook for European use is a complicated affair. There are huge differences in the curricula and in the organization and forms of media studies courses in European universities. On top of that, ways of teaching are (still) different too. We have adapted the book to the

semester- or trimester-long types of courses that are most common, but we have taken care to keep the book's pedagogic approach flexible. This with an eye to enable it to fit into a more compact course or a more extended one.

The book could stand on its own in a short course or it could provide the basic structure for a programme in which each part of it could be extended to encompass related interests. The lists of recommended reading that accompany each chapter offer ways to broaden the programme, to impose different emphases in the course or to vary (raise) the level of difficulty. Another rather obvious way of extending the use of the book would be to narrow down the European, comparative and cross-boundary perspective that we have adopted, and instead take a more nationally focused approach by adding locally oriented studies to the course.

Given that the text is designed as a coursebook, our discussion of television across Europe moves from more general and theoretical to more specific and empirical. The chapters in the first part about 'Television Environments' discuss the profound transition that television has gone through in the last decades. It has moved from an era of public service domination to a multichannel environment commanded by commercial providers and is now on its way to a still uncertain digital future. 'Television Trends', the second part of the book, debates the consequences of these developments for the relationship between television and its audience. Audiences are more and more addressed as consumers instead of as citizens. The operating philosophy of broadcasting has shifted from programmes to programming, i.e. from a concern with the quality of each unit of the output to a strategic concern with capturing and holding audiences. In the case studies that form the third part of the book, 'Television Genres', the developments, problems and issues raised in the first two parts are addressed both explicitly and implicitly. This helps to illustrate and understand the more abstract discussions in the previous chapters. We would expect the different parts of the coursebook to be read sequentially, but the chapters in the last part especially allow for selective use and different sequences.

The book is not just a book for reading (or to suggest further reading), and not even a book for discussing and reading. It is more inquisitive than positive. It is meant to stimulate thinking but also 'doing'. For it is our conviction that the best way to help students get a deeper insight and critical understanding of the fundamental changes that television in Europe is going through, is by activating them to ask questions and find out for themselves. There are numerous relatively simple means by which this can be achieved. This is the purpose of the sets of 'activities' that we have added to several chapters. They are not just points to discuss, but exercises to enable the reader to engage actively in finding answers to questions and to get the taste of media research.

We trust that the exercises (perhaps with minor adjustments) can be done in most places where the coursebook will be used. But it is up to the users in the first place to decide to what extent the proposed activities will

be incorporated in the course. This may also be adapted to local circumstances and adds to the overall flexibility of the programme.

THE EUROPEAN MODULE

It is more than a coincidence that most of the people behind the plan to create this media studies coursebook with a European perspective have been engaged in the development and organization of student and staff exchanges between universities in Europe. It is partly from this experience that the idea of a programme that could be used, with local variations, in different European countries originated.

In the opinion of the editors and authors, existing programmes on broadcasting and broadcasting developments share 'an emphasis on national systems and developments. This may lead to a certain one-sidedness in the treatment of complex media questions, but could also be made productive in developing a comparative course in which national orientations are brought into relation with each other and to which a supranational European perspective is added. Apart from this, the international nature of developments in the fields of media and communication has made an emphasis on strictly national situations obsolete' (application European Module 'Comparative analysis of broadcasting in Europe', Amsterdam, summer 1996).

The plan was realized thanks to the financial support of the European Union for so-called European modules as well as the enthusiasm of the authors and the facilities and additional funding provided by their departments and universities.

At the start ten universities participated: Universiteit van Amsterdam (Kees Brants and Jan Wieten), Universiteit Gent (Els De Bens), Universitetet i Bergen (Marit Bakke), Katholieke Universiteit Leuven (Keith Roe and Gust De Meyer), Universitat Autònoma de Barcelona (Rosario de Mateo), Loughborough University (Michael Pickering and later Graham Murdock), University of Ulster – Coleraine (Des Cranston and later Greg McLaughlin), Friedrich-Alexander Universität Erlangen-Nürnberg (Winfried Schulz), Lunds Universitet (Peter Dahlgren), and Université Michel de Montaigne, Bordeaux 3 (Michel Perrot). Tampereen Yliopisto (Taisto Hujanen) and Helsingin Yliopisto (Terhi Rantanen, later Ritva Levo-Henriksson) later joined the group. The Universiteit van Amsterdam acted as coordinating university. As author and co-author of chapters in this book Sari Näsi (Universiteit van Amsterdam) and Aurélie Laborde (Université Michel de Montaigne, Bordeaux 3) should also be mentioned. A most welcome contribution from outside our group came from Albert Moran of Griffith University, Brisbane, whose study of European adaptations of the Australian soap *The Restless Years* is reprinted here in a revised form with permission of the University of Luton Press.

Our special thanks go to Chantal van Mourik, Sari Näsi and Franca Jonquière for their invaluable assistance at various stages of the project.

NOTE

1 E.g. Euromedia Research Group (ed. Bernt Stubbe Østergaard) (1997) *The Media in Western Europe: The Euromedia Handbook*, 2nd edition, London: Sage; Denis McQuail & Karen Siune (eds) (1998) *Media Policy. Convergence, Concentration & Commerce*. London: Sage.

TELEVISION ENVIRONMENTS: TRADITIONS AND TRANSITIONS

Peter Dahlgren

When we switch on our television sets, we gain access to a number of different channels and the programming that they provide. In our everyday lives this is of course self-evident and seemingly unproblematic. Yet, behind our experience of watching television there are many factors at work that shape the number and kinds of channels that are available to us and the types of programmes they offer. Moreover, these factors have in recent years been increasingly altering the character of television environments in most European countries. Television in Europe today is very different from what it was in the early 1980s, and – perhaps of even greater relevance – we can anticipate that in a few years it will be quite dissimilar from what it is today. Obviously today's television carries forward many recognizable programming and scheduling traditions from earlier decades, but television, as a medium and as a complex institution, is in profound transition. The chapters in this section address these developments, specifying the various forces at work.

In approaching television as an institution, it is of central importance to grasp the basic logic of the two fundamental systems for organizing and financing television: the public service model and the commercial model.

In Chapter 1, Kees Brants and Els De Bens provide an introduction to television in Europe and sketch the basic differences between these systems. In almost all Western European countries, the principles of public service shaped the emergence of television in the post-war years (even in the few cases where there were channels with commercial financing). Indeed, European television was typified by public service monopolies until relatively recently. The aims of public service broadcasting are more complex than those of its commercial counterpart, and it has a more complicated system of accountability. Since public service television is in part structured by the specific political culture of any given country, it has varied somewhat within Europe.

The public service channels are still with us, but they lost their monopoly position in most countries during the 1980s and today television in

Western Europe is characterized by mixed systems. Not surprisingly, the emergence of commercial competitors has had an impact on the programming of public service broadcasters. As Brants and De Bens indicate, the response has varied somewhat between countries, but it is fair to say that in most cases there still remains a significant difference in the programming profiles between commercial and public service television.

Why did television in Western Europe evolve the way it did? What are the factors behind the emergence of commercial broadcasting? And what are the major trends in the new television landscape? These are the questions that Peter Dahlgren takes up in Chapter 2. He suggests that the changes in television have been brought about by the interplay of several factors. At the most immediate level, what is called deregulation opened the doors for commercial broadcasting, terminated public service monopolies, and removed or weakened many rules and regulations for television. In Dahlgren's presentation, deregulation is understood as part of a larger ideological shift away from the traditional model of the welfare state and toward an emphasis on market forces as the key mechanism for societal development. Given that public service broadcasters were all facing fiscal crises and many of these institutions were seen as stagnant and paternalistic, the time was ripe for introducing market mechanisms in television.

This shift toward market forces can in turn be related to widespread changes in society. For example, increasing cultural diversification, especially in regard to lifestyles and consumption, had helped promote a desire for greater choice among television viewers. This growing diversity made it more difficult for public service television, with its limited number of channels, to fulfil its mission. Further, public service was very clearly a product of nation states, and many argued that the world – not least markets and television itself – was becoming increasingly transnational.

In the new media landscape that took shape in the 1980s, cable networks and satellite transmissions became key features, though there is still great variation between different countries as to the degree of penetration of cable and satellite. Public service has generally responded vigorously to these changes. Yet there are lingering questions concerning its role in a situation where all growth within television will be in the commercial sector, and where public service will comprise a shrinking portion of the overall television environment. For the future, it is likely that entertainment programming will continue to increase and that audiences – and the shared public culture – will become more fragmented. Dahlgren ends his chapter with reflections on the implications of these developments for democracy.

The future of television is digital. In Chapter 3, Graham Murdock discusses the emerging digital technology. Digital television is on the immediate horizon, but already we are seeing strong connections being made between the technologies of television, telecommunication and computers. According to Murdock, there is an optimistic rhetoric about the digital development that promises several things. Audio and visual signals will be

made clearer. We will have yet more channels via the digital technology. We will see the convergence of a variety of services, such as television programming, telephony, shopping, banking, etc., via a new 'universal box' that will replace today's television receivers. Finally, viewers will have more control over what they see and when they see it, given the increased interactivity made possible by the digital systems.

At the same time, Murdock warns that there are some very problematic aspects about the emerging digital systems. Already we see a clear pattern of a few major firms dominating the communication industries. The linking of television and computer technologies will accelerate this tendency, resulting in fewer choices for the consumer and a massive concentration of power. Further, given the commercial character of these enterprises, they will proceed on the logic of market niches, not social community. Diversity for minorities and for specialized tastes cannot be expected. Indeed, Murdock sees the main drive-shaft of these developments to be the realm of electronic commerce, to encourage people to make economic transactions. Digital television will be addressing the population as consumers, not citizens.

Finally, digital television will be an expensive proposition; many people will not be able to afford it. But since these people are weak consumers, digital television will have little interest in them. The virtue of universality – accessibility for all citizens – that was one of the hallmarks of public service, will have no place here. Murdock foresees that for the sake of democracy, public service television will have to become active in the digital domain. He suggests that in the new digital age public service television should join forces with other public institutions, such as schools, libraries and museums, to develop a 'digital commons' that would provide universal access. This is one possible future scenario; we can speculate about others. In the meantime, our television environments are undergoing rapid change, even if the future, for the time being, is still open.

THE STATUS OF TV BROADCASTING IN EUROPE

Kees Brants and Els De Bens

In an average West European household television viewing is an intense and varied affair. In the sitting room members of the family will be watching a game show, a documentary or a soap. With the remote control in hand, every now and then one of them zaps along the channel supply to see whether a sports programme or the national news has already started. In another room one of the children will be watching a music channel with the latest video clips or decides on a video or film, on offer via the pay TV channel. This picture may differ across households and across countries – often depending on the availability of cable or a satellite dish which allows for a multiplicity of channels – but the choice and the variety of watching opportunities is enormous, and still extending.

At the same time, while members of one family may have different viewing experiences, there is also a cross-national familiarity and some-times even similarity in what is on offer. TV news will have a national emphasis or angle, but going abroad and watching TV from a hotel room, one can see a familiar programme dubbed in another language, or a format like *Wheel of Fortune* adopted to the national taste with a different presenter and a slightly different style. And everywhere American sitcoms and films fill the small screen. Looking at a listings magazine and com-paring the different channels, one is astounded to see how often one and the same film, talk show, serial is shown on different channels in different countries in the same week.

This complex and constantly changing picture of European broadcasting is relatively recent. In fact, it is a picture of the last ten, twenty years. In this chapter we present an overview of the history, system and changes of television in Europe, comparing the different countries' and different systems' media economics, organizational structure, goals and program-ming.

With the notable exception of Luxembourg, where a commercial system has always been in place, the history of broadcasting in Europe is rooted in an idea of public service. There is, however, not one theory or generally accepted notion of what public service broadcasting (PSB) stands for, and the variations in form according to national priorities and traditions are manifold. But even though there might be a different organizational structure and typical national programmes, that patchwork quilt we call the West European broadcasting system was, roughly until the 1980s, based on a belief that the programmes produced one way or the other had to be in the public interest. It usually meant that there was an explicit reference or implicit assumption of diversity and quality, catering for all while not forgetting minorities. It is only recently, with the system more or less in crisis, that decision makers are consciously referring to and nostalgically embracing what are seen as the functions of public broadcasting. For decennia the system had been self evident, unchallenged and heralded as a dam against what were considered to be the evils of commercial television: the mediocre and the popular, of which US television was the prime example.

In that history of public broadcasting in Europe it is not always clear what is fact and what is fiction, because the spectacles of hindsight are sometimes coloured by wishful thinking now that the creation seems to be overrun by avalanches of commercialization. In the 'good old days', first radio and later television was considered to provide 'public goods' which should be available to all, wherever they lived, for the same price. Most of us are familiar with water, electricity and the telephone as goods falling under this principle of universal service. But contrary to the USA, where broadcasting started as a commercial venture left to the freedom of the market, in most European countries the supply of radio (from the 1920s) and TV (roughly from the 1950s) was considered to be in the public interest. As such, the public goods of radio and TV had to be produced and distributed by institutions and by mechanisms guaranteed by the state and other than that of a market economy.

Why this deviation from a 'normal' pattern of capitalist production in which the ultimate aim is the maximization of profit and which dominates for instance that other mass medium, the press? There is a mixture of reasons. First of all, the sky had its limits. There were more demands for terrestrial space than there were frequencies at the time. So someone had to decide who could go on air and who not. To have a fair system of frequency allocation in a situation of scarcity, the state should be intimately involved, as it is both the representative and the guarantor of the general interest. Secondly, public broadcasting is a pragmatic compromise, comparable to and in line with the treatment of the welfare state. It has been 'firmly rooted, as a belief system and a set of institutional practices, in the optimistic, humanistic Enlightenment idea that the world can be made a humane

place for all, and that the collective (the nation, the region) is important in order to allow the individual to flourish. Public good and public service converged in broadcasting' (Corcoran, 1996: 10). Shocked by the experiences of the Second World War, where the German Nazis under propaganda minister Goebels used radio to indoctrinate the people, the post-war development of broadcasting involved both protection from and intervention by the state.

Finally, partly due to this state intervention but also because governments saw the benefits as well as the dangers of this powerful new medium, public service broadcasting corporations were highly politicized organizations. There would usually be an uneasy balance between, on the one hand the ideal of editorial independence, which went with the Enlightenment ideal of the public sphere, and on the other hand the political reality of (sometimes direct) powers over finance and appointments, and a claim for easy access to the TV channels by representatives of what Golding (1994) has already described as the 'public relations state'.

The link between politics and broadcasting was not the same everywhere in Europe. Countries like Britain, Ireland and Sweden had more formally autonomous systems, in which mechanisms for distancing political organs from broadcaster decision-taking had been adopted. Germany, Denmark, Belgium and the Netherlands could be described as politics-in-broadcasting systems, in which the governing bodies of the broadcasting organizations included representatives of the country's main political parties as well as of social groups loosely affiliated with them. And in countries like Greece, Spain, Italy and France, state organs were in the past authorized to intervene in broadcaster decisions (Kelly, 1983: 73).

In spite of these political differences, we have seen a striking resemblance in European television of specially mandated, non-commercially driven organizations, publicly owned and funded, and publicly accountable. In 1994 the Council of Europe, in light of the threat to public broadcasting, summarized the cultural and social goals which justify such strict structures:

- a common reference point for all members of the public;
- a forum for broad public discussion;
- impartial news coverage;
- pluralistic, innovative and varied programming;
- programming which is both of wide public interest and attentive to the needs of minorities;
- reflection of the different ideas and beliefs in multi-ethnic and multi-cultural societies;
- a diversity of national and European cultural heritage;
- original production by independent producers; and
- extended viewer and listener choice of programmes not provided by the commercial sector (Council of Europe, 1994).

Quite a mouthful. And it will not always be easy to recognize one's own national public broadcasting system in it. It should be read, paradoxically,

both as an idealization of 'days gone by' and as an ideal worth striving for. As such, it could be read as a statement, a definition contrasting what Europe is supposed to stand for culturally with the economic primacy of commercialization, epitomized by the private model of (US) broadcasting. But what does the situation in Europe look like, now that we have entered the 21st century and public TV stations are just one from among many?

THE LANDSCAPE

Indeed, the picture has changed dramatically in the last decennia of the previous century. The technological developments of cable and satellite and a changing political climate have opened up opportunities for television to flourish as a commodity-selling industry. Gradually commercial channels – which can be local, national or international, general or special interest, a copy of the familiar or a completely new experience – are beginning to dominate the television landscape. Up to the early 1980s the public broadcasting system dominated in the 17 countries of Western Europe. Against some 40 public channels in 1980 there were only four commercial channels, in only three countries (Luxembourg, Finland and the UK). At the end of the 20th century the balance has shifted. In spite of the fact that there are still no private companies in the national terrestrial television stations in Austria, Denmark, Ireland, the Netherlands and Switzerland, cable, satellite and a wind of liberalization have opened up markets for private companies in most West European countries and created a different broadcasting system (see Table 1.1).

Looking at national channels, both terrestrial and cable or satellite, we see in the 17 countries almost 60 public and over 70 private channels intended for a national audience and reaching more than 50 per cent of households. Moreover, there are now hundreds of mostly private cable and satellite channels that reach a smaller size audience per country, with a special interest character (music, sports, all news) or aiming at local or regional audiences. Only Austria, Ireland and Switzerland seem to hold on to a 'pure' public system, but in reality the last two already have a number of smaller private channels and Austria has some 19 local private TV stations. It is only a matter of time until Europe has no country without national private television.

The level of cable penetration and satellite dish sales still gives a rather scattered picture, which also explains the level of 'advance' in the different countries. Although potentially there are hundreds of satellite channels available (via Astra, Eutelsat, Hispasat and Intelsat, to name the most important ones), the penetration of dishes exceeds 20 per cent only in Austria and Germany. In cable infrastructure Belgium, Switzerland and the Netherlands stand out, while in large countries like Italy, Spain, Greece, the UK and France it is virtually absent. In Spain and the UK infrastructural

TABLE 1.1   Television in Western Europe

	Number of national terrestrial, cable & satellite channels (> 50% reach) (1999)		Market share national channels in % (1998)		Cable penetration in % (1998)	Satellite dishes penetration in % (1997)
	Public	Private	Public	Private		
Austria	2	–	50	–	37	40
Belgium	5	5	32/17*	39/20	97	7
Denmark	3	1	68	10	66	20
Finland	2	2	47	48	40	10
France	6	15	44	52	11	12
Germany	11	12	42	51	48	31
Greece	3	6	10	72	0.6	5
Ireland	3	–	53	–	49	8
Italy	3	7	40	45	0.2	6
Luxembourg	–	1	–	58	87	6
Netherlands	3	8	37	43	90	4
Norway	2	3	43	44	37	18
Portugal	3	1	50	50	13	11
Spain	2	3	34	48	3	18
Sweden	3	5	48	43	52	20
Switzerland	3	–	26	–	95	20
UK	2	5	45	42	10	20

* Flanders and Wallonia respectively.

Source: Based on data from the European Audiovisual Observatory, 1999

development is under way now. The number of channels the different cable networks supply ranges from 11 (Finland, and some networks in the other Scandinavian countries, Germany and Switzerland) to more than 40 (in Portugal, Luxembourg and some of the other Scandinavian networks). The last ten years have observed an increase of pay TV channels to around 300 (depending on definition). About one-third is freely available, one-fifth are premium channels and the rest are broadcast encrypted and often available in packages of thematic services for a subscription fee. The overall effect of this explosion of channels and viewing opportunities has been a sizeable decrease in the audience for the traditional national public channels. Where until the 1980s they usually had a more or less complete monopoly, we now see that only the Danish and Irish public channels have more than 50 per cent of the market share. In Greece, Switzerland and Belgium the public stations have severe difficulties holding on to their audiences who, with the remote control in hand, zap across the multiplicity of channels. The coming of digital TV will further affect their market share and will also increase the number of subscription or pay-per-view channels.

   To distinguish between the public and the private and to describe the status of TV broadcasting in Europe – its similarities, disparities and changes in the different countries – it is useful to highlight some of the characteristics of both broadcasting systems. We will therefore look at the ways they are financed, to whom they are accountable, what their

mission is and what the programmes look like. In reality the public–private dichotomy is, however, a continuum between public aims and private ambitions, between political beliefs and economic realities.

FINANCING

As we have seen, the public service model was dominant in Europe until the mid-1980s. Only Luxembourg's CLT (better known as RTL) was from its beginning in 1929 purely private. In 1954 a commercial Independent Television Authority was established in the UK next to and competing with the BBC and in Finland MTV was established as an independent private company which had to pay one-fifth of its earnings to the public YLE. Elsewhere in Western Europe the public TV channels had a monopoly and were financed mainly through licence fees. These fees are mostly collected by official authorities (only in the UK and Austria do the corporations collect them themselves) and in most countries Parliament decides on the amount and about the endowment that will be attributed to the public service corporation. Not in every country do the corporations get the full amount, which makes public service systems vulnerable to and dependent on political decision making. The same can be said for the situation in the Netherlands, where in 1999 the government abandoned the licence fee and now pays directly from taxation.

In most Western European countries licence fees for a colour TV set vary from 100 to 200 Euro. France's fee is among the lowest in Europe, with ± 100 Euro for a colour TV set. Four million households in this country are not required to pay, on account of their low income. This has resulted in insufficient funding so that public TV channels have become more and more dependent on TV advertising revenue. France is not alone in this. In order to increase their financial revenues, many of the public service TV systems introduced TV advertising on a limited and non-commercial basis: the money earned went into programming (see Table 1.2). The amount of advertising and insertions were legally restricted so that the print media, which are highly dependent on advertising revenue, would not suffer. In the UK, Norway, Denmark, Sweden and Belgium no advertising was allowed on public TV (in the French speaking part of Belgium TV advertising was introduced, in a limited way, in 1989 on the public TV RTBF).

Over time, public service systems have become more and more dependent on advertising revenue, as a rise in the licence fee was not considered viable in light of the growing number of commercial channels that were (relatively) freely available. Some countries even cut their fees. In Spain a fee never existed. After the Franco regime, the Spanish government decided that the PSB-system was to be financed by advertising revenue and small public support. This situation was unique in Europe and until today there is no licence fee in Spain.

TABLE 1.2   Public service TV revenues (%)

	Licence fee	Advertising/sponsoring
Austria	46	53
Belgium (W.)[†]	65	34
Belgium (Fl.)	69	31
Denmark	91	9
Finland	74	26
France	44	56
Germany	60	31
Greece	82	7
Ireland	35	65
Italy	56	40
Netherlands	69	22
Norway	97	3
Portugal	23	62
Spain	13	75
Sweden	94	6
Switzerland	71	28
UK	78	15*

* Mainly programme sales.
[†] W. = Walloonia
  Fl. = Flanders

Source: European Audiovisual Observatory, 1999

With the success of new commercial TV stations from the mid-1980s, the advertising revenue of public channels in some countries fell sharply. In Germany for instance, ARD's advertising revenue decreased from 19 per cent in 1988 to 4.1 per cent in 1994. ZDF, the second public TV system, in 1988 still had 38.4 per cent and in 1994 only 15.8 per cent (Ros, 1998: 228). The same happened in many other countries and the loss of advertising caused many a PSB financial problems, prompting them to campaign for the removal of legal restrictions on TV advertising. At the same time, many PSB systems were allowed to carry sponsoring, even in those countries where advertising was forbidden.

The success of the first commercial stations has recently been affected by many newcomers who have intensified the competition for viewers and advertisers in a relatively inflexible advertising market. In the UK, ITV's advertising income dropped from 85 per cent in 1991 to 78 per cent in 1995; BSkyB has become an important competitor on the TV advertising market. In Spain the three new commercial stations provoked an acute crisis for the public TV (RTE). This led to a dramatic situation in the 1990s in which RTE accumulated debts, forcing government support. In fairly exceptional situations like that of Denmark, the new commercial stations were, from the point of audience share, less successful than public TV. The erosion of the advertising market in the digital age will undoubtedly place a further burden on the survival chances of many (public and private) channels. In a 500-channel world, 490 services will fight for ever smaller audience fragments (Jankowsky and Fuchs, 1995: 161). Indeed, many

13

authors have their doubts whether an extension of the channel range will drastically alter viewers' habits. In most countries viewers are relatively loyal to the channels in their own language and the market quickly reaches saturation point in terms of segmentation (Achille and Miège, 1994: 43; De Bens, 1998: 33).

As the advertising market will not be large enough and audience fluctuation creates uncertainties for advertisers, viewers will have to pay for most *à la carte* services, notably sporting events, that accompany digital television. Some thematic channels offering movies, sports or news might be successful. Many pay TV channels in Europe, however, never reach their break-even point and demonstrate that viewers are not easily prepared to pay for TV services. Most of the movie channels in Europe broke down or were taken over by their more powerful rivals such as Canal Plus. This transnational pay channel, originally a movie channel, acquired the broadcast rights of important sports events. In 1996 the European Parliament amended the renewed directive, Television Without Frontiers, ensuring free access to television coverage of major sports events like the Olympic Games, world and European soccer championships. Pay TV channels like Canal Plus will be obliged to sell these broadcasts at a 'reasonable price' to national TV channels, an amendment multinational media tycoons are strongly objecting to. On the other hand, Canal Plus and Eurosport have pushed most of their competitors out of the market, only to illustrate that the thematic, narrowcast TV market is a high risk business.

It cannot be denied that in Europe public broadcasting systems are under heavy pressure. The European Commission has argued in the past that licence fees were to be interpreted as an unlawful state subsidy. This could threaten public service broadcasting. On the initiative of the Dutch government, with the support of Belgium, Ireland, Sweden, the European Broadcasting Union (EBU) and the European Parliament, a proposal was made to the EU Council of Ministers that licence fees for PSB be excluded from the definition of state subsidy. At the Amsterdam Summit meeting of 1997 a protocol to that effect was adopted.

ACCOUNTABILITY

Commercial broadcasters sometimes say that they produce real public TV, because they know and do what the public wants. To put it simply but not untruly, however, the commercial broadcaster is ultimately in the business of making money and thus accountable only to his shareholders. They judge his performance on the basis of audience-related cost–benefit ana-lyses of the annual turnover. The bottom line of commercial accountability is whether the books say in hard cash what the broadcasters have promised their programmes will deliver in audience size. If the latter waver