Chapter 11

From Public Service Broadcasting to Public Service Media

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The Amsterdam Protocol (1997) has made it clear that the duality of the European broadcasting landscape is explicitly recognized by the European Union institutions. One consequence is that the European Union (EU) goes along with government subsidization of public broadcasters, on condition that there should be a sufficient degree of transparency and proportionality between the funding provided and the services rendered. What output is being delivered by Public Service Broadcasters (PSB) and in what circumstances, given their budget, the degree of market competition, and the taste cultures of the audiences targeted, will be the topic of this chapter.

Statement of the Problem: Main Challenges

New information technologies, liberalizing the European Union and national policies, together with rapidly changing societies – from mono- to multicultural – undoubtedly entail serious consequences for the prospects of public service broadcasters in Europe. Consequently, they will need to solve their current identity crisis, reformulate their remit and reorganize their institutions in order to stay in tune with the societies they want to serve. Offering a one-size-fits-all model, which would allow public service media to 'reinvent' itself while responding to all social, ideological and cultural changes since the 1920s when public service broadcasters were born, is an impossible task since the concept of public service broadcasting has developed along partly converging and partly distinct lines in each European country (d'Haenens and Saeys 2007). This chapter will touch upon a number of ingredients which we believe are necessary to strike a healthy and durable balance between the mission attributed to the European public service broadcasting – universal service, quality, diversity, public value, etc. – and institutional security.

This balance cannot be achieved without taking the technical innovations, as well as the political, economic, legal and cultural conditions, to determine how broadcasting systems can and should be operated into account. Obviously, these contextual conditions are paramount to the structure, production, distribution and consumption of media content. In the wake of digitization, internationalization and convergence, the broadcasting sector throughout the western world has gone through some sweeping changes in the last few decades (Broeders, Huysmans and Verhoeven 2006). However, this evolution has not led to greater uniformity per se, as critics feared when the deregulation and advent of commercial broadcasting began to be felt in Europe as of the second half of the 1980s (Dahlgren 1995).

Even though commercial channels spread like wildfire, and regulation and interventions at the level of the European Commission led to policy convergence, this did not result in identical structures and strategies being set up by public broadcasters throughout Europe, nor did it end in extreme superficiality of output. Major differences continue to exist in the European context, which is characterized by more than just one single national public broadcasting model (e.g. PSB obligations are shared by the BBC, ITV, Channel 4 and Five in the United Kingdom; the 'pillarized' model in the Netherlands; the PSB function outsourced to a private broadcaster, the RTL group in Luxembourg; Portugal's test with public channel RTP2 as a 'civil society' channel for content from various public and private organizations).

The differences observed among the various European Union member states are not only – and not even primarily – linked to the members' time of accession. The long-standing cultural, economic and social diversities found in Europe have always been apparent in the broadcasting systems of the members.

Resulting from their comparison of media and political systems in several western countries, Hallin and Mancini (2004) developed three 'ideal types': (1) the 'liberal model', mainly to be found in Great Britain and its former British colonies (United States, Ireland and Canada); (2) the 'polarized pluralist model' with considerable levels of politicization, state intervention and clientelism in Mediterranean countries like France, Italy, Spain, Portugal and Greece; and (3) the 'democratic corporatist model' which is present in the Scandinavian countries, the Netherlands, Austria, Switzerland, Belgium, as well as Germany, and which strongly relies on the role of organized social groups in society, as opposed to a more individualistic concept of representation in the liberal model. In Great Britain, for instance, the monopoly of the public broadcaster was broken as early as the 1950s, while the evolution towards a dual system was much slower in the Nordic countries. In between these two extremes, one can find countries such as Germany, France, the Netherlands and Belgium, while the radically commercial broadcasting system of Luxembourg can be regarded as an exception. The newcomers from eastern Europe obviously have their own history and traditional broadcasting contexts, and can find it hard to adapt to the standards laid down by the European Union straightaway, since these EU standards are fashioned on a fairly western pattern.

The multiplication of the number of broadcasting stations in Europe is to be considered the direct cause of the fragmentation of the audience (see, among others, Picard 2000). In so doing, the nature of the media as a force that binds people together is weakened and the shared media experience risks disappearing. Also, the following question can be raised: will this overwhelming presence of the media be effectively utilized? Research into time-spending patterns reveals that we do not spend more time on media, but that shifts have occurred from the 'old' to the 'new' media and that functions of the media are also shifting. A final argument is that a further increase in the number of content providers is bound to result in the fragmentation of financial resources, inevitably leading to a loss of quality (Picard 2000).

This chapter will be looking into public service broadcasting in the multimedia environment or, put differently, into the transition from public service broadcasting to public service media. The one thing, among others, that this chapter proves is that the demise of public service broadcasting is far from being as serious as forecast. In recent years, public broadcasters in some European countries managed to be at the heart of public attention, as the problems are obviously numerous: commercialization, the individualization of society, and political climates not being too keen on finding adequate and future-proof financing mechanisms. Digitization – the most recent battlefield for public broadcasters – entails new media platforms offering user interactivity and a more targeted, thematic supply of content. This is aimed at audiences (especially the younger segments of under 40 years of age) who although still continue to view in a linear fashion, they gradually devote more time to non-linear viewing (viewing-on-demand), irrespective of the content carrier.

Within this context of blurring borders between media, it is becoming increasingly hard to continue referring to separate media carriers. Hence, more and more voices are raised advocating a functional approach to the media: in outlining a media policy, policy-makers should no longer focus on the separate media platforms, but rather on the needs of society at large, i.e. on the social functions which the media landscape as a whole must definitely meet (van de Donk et al. 2005). The role of the public service concept behind this background will be centrally dealt with in this chapter, as well as the specificity and distinctiveness of the European full-fledged, 'all-in-one' PSB model versus the US 'niche' model which has more modest pretensions in relation to popular reach and social impact.

The European concept of public service broadcasting as a comprehensive and universal service is challenged by both European authorities and national governments at three levels: (1) mission and programme task (comprehensive or complementary programming?); (2) organization (central organization, publishing model or 'distributed public service'?); and (3) financing (license fee, advertising or 'state aid'?) (see also Bardoel and d'Haenens 2008b; Donkers and Pauwels 2008). At the European level and in many western countries there have been pressures towards a more 'pure' model of public service broadcasting and/or towards the de-institutionalization of PSB and 'distributed public service'. More in general, the traditionally close relationship between public broadcasters and national politics has become more distant and problematic; at the same time, the viewing and listening public has abandoned public broadcasting stations in favour of their commercial competitors. Moreover, recent European competition policies and jurisdiction make it imperative to formulate the public remit in a much more explicit manner, and to make public funding much more transparent and proportional in order to ensure an equal level playing field for both public and commercial broadcasters.[1]

In other words, looking at the current map of the EU media space – a complex regulatory framework, structural-financial constraints, technological changes due to the information society's uncertainties and opportunities, as well as more individualized consumer behaviour – we ask ourselves: where can the public service media go from here? Or, to put it differently: what content strategies are there for public broadcasters in terms of remedying market failure and offering public value, in a world of rampant commercialism, fragmentation, time and place shifting?

Therefore, this chapter deals with the concept, performance and transformation of public service broadcasting in Europe, in light of dramatic technological and political changes. The Euromedia Research Group has for a long time followed the different phases of this evolution, from the fall of the old national public service monopolies and the rapid growth of the commercial sector in most countries, to today's paradigmatic shifts in the media field thanks to the Internet.

Early in their competition with commercial rivals, many public service broadcasters were struggling with how to position their channels, programme output and schedules in relation to private channels with their heavily entertainment-oriented schedules. Soaring prices for attractive sports, major movies and TV series as well as media personalities, required more money and demanded more efficient operations. Until digital distribution was introduced, analogue public broadcasters retained strong – albeit declining – market shares of viewing and listening. They were, however, often criticized for lowering their traditional quality and becoming too commercial (Hultén and Brants 1992).

Competition grew tremendously when digital TV distribution was introduced, first via satellite and cable, later via terrestrial networks. In northern Europe, most TV households today receive a great number of channels; in southern Europe, this diffusion process is significantly slower. Fragmentation of audiences is a reality for all channels, but commercial broadcasters are able to offer bigger bundles of services. This is especially the case in the bigger EU markets. The opposite trend can be identified in the smaller European Union countries, where the public broadcasters prove to be the initiators of digital initiatives, and the commercial broadcasters are following. Overall, the challenge facing public service broadcasters is how to keep a broad output, to remain distinct and different, offer public value, and be attractive to their audiences (Hultén 2007).

Structure: Regulation and Policy Actors

The governments of the European Union member states have to engage in a good deal of give-and-take between their own media policies on the one hand, implemented at the local, regional and national levels, and the rules established by the European Union on the other hand. In the initial stages, European regulation mainly focused on the creation of competitive, creative and diverse content industries (see Biltereyst and Pauwels 2007). In the 1980s and 1990s, increasing competition between public and commercial broadcasters led to the convergence of content, which caused the former to suffer a fundamental identity crisis. Europe-wide, a cautious trend towards the re-regulation – instead of deregulation – of broadcast policies can be observed, in which the focus is on policies that are more flexible and more effective (e.g. contributing to the Lisbon agenda and acting as a crucial component to the 2010 policy strategy adopted by the European Commission in June 2005), but which are also more selective in regulating

the media. Recent regulatory changes at both the national and EU levels also show a tendency to favour a market-orientated approach (Steemers 2003; Michalis 2007). Also, traditional regulation is felt to be too static to cope with the rapidly changing context. New concepts such as 'self'- or 'co-regulation' and 'process regulation' are thus introduced.

Against this liberal(izing) policy climate illustrated in the 1989 Television without Frontiers Directive (TVWF), the last public service broadcasting monopolies in the European continent came to an end around 1990, and 'dual' broadcasting structures comprising of public and commercial actors were put in place. At the same time in eastern Europe, state-controlled media complexes were dismantled and often a shift was made towards highly commercial media landscapes. The Amsterdam Protocol of 1997 has made it clear that the duality of the European broadcasting landscape is now explicitly recognized by the EU institutions. One important consequence is that the European Union now goes along with government subsidization of public broadcasters, admittedly on condition that there should be a sufficient degree of transparency and proportionality between the funding provided and the services rendered (Pauwels 2006; Hirsch and Petersen 2007; Broeders, Huysmans and Verhoeven 2006; Coppens 2005). The funding of PSB is subject for debate, both because of the questionable willingness of the public to continue paying the licence fee, and the uncertain future of mixed-funded PSBs which have resulted in numerous 'unfair competition' complaints by commercial competitors. Most public broadcasters are mixed income-based (see Table 1). As the counterbalance of commercial income (advertising) tends to decrease, public funding only becomes more important.

Given its public mission and the notions of independence attached to it, one could expect public funding to be the major source of income for public broadcasters. However, when analyzing Table 1, this seems far from obvious, and in some countries (e.g. Spain and Poland) it is rather the exception than the rule. In general, the clearest financial fracture can be identified between the more solid public broadcasting systems of the United Kingdom, Germany and the Nordic countries (with a public income ratio between 80–95%) on the one hand, and on the other hand one finds the more privately funded public broadcasters of the Mediterranean basin (Spanish TVE running with less than 10% of public funding; the Italian and French public broadcasters operating on 49–57% public funding; and EU newcomer Poland with 30% of public funding). In France, for instance, the financing issue is hot, as it is the intention to considerably increase the licence fee. Less advertising income should be compensated by taxes stemming from private broadcasters, mobile telephone operators and Internet providers. Small countries like Switzerland, Slovenia, Belgium and the Baltic states tend to rely on public funding for two-thirds of their total budget. In addition to these differences in the income sources, large discrepancies remain in terms of total income. Whereas the total public broadcasters' income of large countries such as the United Kingdom and Germany fluctuates around five billion Euros, their smaller Belgian, Slovenian, Baltic and Scandinavian counterparts have to make do with a budget ranging between 17 million and 480 million Euros. The question how these budgets are spent and on which programme genres will be dealt with later in the chapter (see also Table 2).

Table 1: Sources of Income of Public Broadcasters According to Size and Region.

Countries		Total In Euros thousand	Public In %	Private In %	Other In %
SIZE					
Large Countries					
United Kingdom					
BBC	2004	5 561 637	73.7	26.2	0.2
	2005	5 578 730	77.0	22.9	0.1
	2006	5 745 438	81.4	18.5	0.1
	2007	6 141 739	80.3	19.7	–
	2008	5 552 000	81.0	19.0	–
Germany					
ARD	2003	5 703 253	85.9	12.6	1.4
	2004	5 818 075	85.1	13.3	1.6
	2005	5 948 998	86.1	13.6	0.4
	2006	6 056 268	86.3	12.7	0.1
	2007	6 075 270	86.3	13.0	0.8
ZDF	2003	1 763 366	85.8	11.7	2.6
	2004	1 795 797	84.8	12.4	2.8
	2005	2 061 601	78.6	12.0	9.4
	2006	1 965 622	84.9	13.4	1.7
	2007	1 927 218	86.6	12.9	0.5
France					
FR2	2004	1 133 400	54.4	41.1	4.5
	2005	1 096 800	56.9	42.9	0.3
France Televisions	2006	2 961 000	61.9	34.4	3.6
Poland					
TVP	2003	353 100	32.7	56.1	11.2
	2004	394 100	32.4	61.2	6.4
	2005	486 800	28.2	60.1	11.7
	2006	509 000	27.2	59.7	13.1
Small Countries					
Switzerland					
SRG SSR Idée Suisse	2004	1 136 470	64.4	35.6	–
	2005	1 126 710	64.2	35.8	–
	2006	1 108 270	63.2	36.8	–
	2007	1 105 130	62.3	37.7	–
Slovenia					
RTVSLO	2004	107 974	70.7	28.2	1.1
	2005	109 814	71.4	28.6	1.1
	2006	116 877	66.1	18.5	15.4
	2007	114 524	–	–	–

Countries		Total In Euros thousand	Public In %	Private In %	Other In %
REGIONS					
Mediterranean Countries					
Spain					
RTVE (replaced in 2007 by the Corp. de Radio y Television Española)	2004	874 377	9.3	86.2	4.5
	2005	858 667	9.5	85.8	4.7
	2006	1 320 280	43.9	55.2	0.9
	2007	1 183 805	–	–	–
Portugal					
RTP	2005	266 100	75.3	24.7	–
	2006	292 100	76.8	23.2	–
	2007	314 900	76.3	23.7	–
Greece	–	–	–	–	–
Italy					
RAI	2004	3 021 300	51.8	46.2	2.0
	2005	3 152 900	49.6	47.5	2.9
	2006	3 217 400	49.3	49.2	1.5
	2007	3 290 200	50.4	48.2	1.4
Benelux					
Belgium					
Flanders VRT	2004	367 840	62.9	27.1	10.0
	2005	405 670	62.5	27.0	10.1
	2006	456 300	61.4	13.1	25.4
Wallonia RTBF	2003	276 540	63.2	31.8	5.1
	2004	297 960	59.9	27.7	12.3
	2005	257 081	72.7	26.1	1.1
	2006	266 614	72.1	25.9	2.0
Netherlands					
Dutch public broadcasting system	2003	771 500	66.2	29.0	4.8
	2004	805 900	64.1	26.9	9.1
	2005	837 900	66.4	22.4	11.2
	2006	678 900	54.6	29.1	16.3
Luxembourg	–	–	–	–	–
Baltic States					
Estonia					
Eesti Television (ETV)	2003	12 095	–	–	–
	2004	14 182	–	–	–
	2005	13 898	–	–	–
	2006	16 672	–	–	–

Countries		Total In Euros thousand	Public In %	Private In %	Other In %
Eesti Rahvursringhaaling (ERR)	2006	25 439	–	–	–
	2007	27 725	–	–	–
Lithuania LNRT	2003	15 100	70.2	29.8	–
	2004	17 300	63.6	36.4	–
	2005	17 400	63.8	36.2	–
	2006	19 900	61.8	38.2	–
Latvia	–	–	–	–	
Scandinavian Countries					
Denmark DR	2004	457 977	87.5	12.5	–
	2005	469 850	88.3	11.7	–
	2006	474 908	92.1	7.9	–
	2007	484 384	91.9	8.1	–
Sweden SVT	2003	449 100	93.1	0.6	6.2
	2004	478 900	92.7	1.1	6.1
	2005	444 317	93.5	–	6.5
	2006	452 837	90.9	–	9.1
	2007	426 682	93.0	–	7.0

Sources: European Audiovisual Observatory (2005b, 2008a).

Bearing in mind that the present-day media landscape is in transition and there is now a superseded notion of separate platforms for print-media and broadcasting, the Television without Frontiers Directive has been amended in light of the provision of non-linear services (such as video-on-demand) and has been renamed into the Audiovisual Media Services without Frontiers Directive (AVMSD), which is currently in the process of being implemented in the different member states (Nikoltchev 2006). Worthwhile in this context is the attention-grabbing report 'Focus on Functions: Challenges for a Future-Proof Media Policy', produced by the Scientific Council for Government Policy of the Netherlands (WRR 2005), which suggests a number of stimulating scenarios for the future of the media.

The fact is that the Internet, and the headlong internationalization and commercialization of media companies, are rapidly and radically transforming the media landscape (Küng, Picard and Towse 2008). Technological developments connect old media with new ones, making it possible to watch television on the Internet and listen to radio on mobile phones. Infrastructural facilities that used to be strictly separated, such as cable and telephone lines,

are now competing with each other for the distribution of digital media, the growth of which is truly explosive. The impact of European regulation in this sector has become so substantial that the national governments' scope for legislation has shrunk: the European Union can now label national support for Internet activities as disproportionate and as a distortion of competition; it can be forbidden and the government concerned can be censured. The logical outcome of technological convergence, therefore, is legal convergence and the move towards a functional media policy. However, the tide seems to be turning in several EU member states, with public broadcasters not only regaining a part of the market but also finding back their *raison d'être* (Coppens and Saeys 2006).

In this respect, radio tells us an interesting story. When comparing radio use with television, Internet, newspaper and magazine exposure, the former continues to show a remarkable strength with its weekly average of 13.2 hours, representing one of the highest absolute media use figures (EIAA 2008a). While analogue audiences, especially young people, are declining (EBU 2007a), digital radio (DAB and DRM) may change the tide thanks to its wider variety of content supply, and its higher availability on multiple platforms and standards. This new situation entails a shift in the production from traditionally-passive-flow radio to active-demand radio where the audience can pick, choose and mix preferred content whenever and wherever it suits them. With a more and more demanding audience, the real challenge is not to make listeners choose between parallel universes of linear programming but to offer all content on one platform which can be controlled and personalized according to audience preferences.

An obviously important partner in this radio development is the Internet. While television and the Internet are often experienced as mutually competing platforms, the radio and the Internet are complementary by their very nature. Among young Internet users (25–34 year olds), 36 per cent listen to the radio while searching the Internet (EIAA 2008b). Nowadays ARD, BBC and SR radio sites already stand out as the most popular radio websites among European Broadcasting Union (EBU) members (EBU 2007b). Nevertheless, in an effort to reach young audiences in particular, specifically targeted channels and initiatives are being launched and tested. By way of example, focus groups conducted by the Danish radio DR (Danmarks Radio) revealed that young people do not always fit in the audience groups as outlined by radio producers since they like to go their own way. As a result, DRDK recently experimented with a personalized Internet radio platform, a mix of radio on-demand and podcasting, on which one can create one's own radio stream by picking and mixing different kinds of contents (Heiden 2009). Furthermore, by attempting to visualize entire radio programmes on multiple platforms, BBC Radio 1 tried a visual version of two radio programmes in January 2009, providing live footage of the radio programme's presenter simultaneously with text messages sent in by listeners on the Internet (Spencer 2009). Another recent example of combining multi-platform and mobile radio is the Swedish SR Pod Radio, which made use of an MP3-browser and player allowing to podcast content from the Swedish public radio through WiFi or 3G (Torberg 2009).

Beyond and above these promising initiatives, a stable and dedicated transmission network will need to remain vital in order to maintain public radio broadcast prominence and avoid public radio being relegated to a merely supplementary function. As the EBU (2007a) formulated, the challenges for public radio broadcasters in the future will be to 'support open standards, secure provision of adequate spectrum, secure PSB's free access to digital platforms, secure digital content rights including music rights, provide distinct and competitive content on all platforms, increase availability of programmes in a convenient form, and create new forms of intriguing, innovative, involving and interactive radio formats'.

Conduct: Mission, Content and Driving Forces

The demand to renew the PSB mission premise first became pressing after the Amsterdam Protocol (1997) and Communication on State Aid (2001). As Jo Bardoel and Gregory Ferrell Lowej (2007: 14) rightly state, 'this period coincides with the rapid development of non-linear media, especially the Internet, and the associated escalation of convergence phenomena. It has become increasingly clear that making the transition from PSB to PSM [Public Service Media] requires effectively renewing the public service ethos because it alone remains the ground for any convincing case.' The main contextual drivers stimulating PSB to become PSM are digitization, globalization, convergence, fragmentation, individualization and a paramount market logic (see also Bardoel and d'Haenens 2008a). In this respect, the match between radio and the Internet dealt with in the former section is an interesting point in case.

In its 2001 Communication on the application of State aid rules to public service broadcasting, the European Commission stipulates that the definition of the public service mandate should be 'as precise as possible. It should leave no doubt as to whether a certain activity performed by the entrusted operator is intended by the Member State to be included in the public service remit or not. [...] Without a clear and precise definition of the obligations imposed on the public service broadcaster, the Commission would not be able to carry out its tasks.' From this, it is clear that on the basis of 'subsidiarity' the European Commission leaves it to the member states to formulate the task – broad if necessary – of public service broadcasting, while at the same time making it quite clear that as far as the Commission is concerned this task cannot be concrete enough.

Obviously a central component of the mission is the programme assignment of public broadcasting. The current debate on this issue can be summarized by the catchwords 'comprehensive or complementary'. In practice, most public broadcasters have chosen, principally or pragmatically, for the middle way of compensation. The discussion about the future of PSB revolves around two competing visions: that of the pure 'monastery model' on the one hand, and the 'full portfolio model' on the other (Jakubowicz 2003). The former vision is shared by the critics of PSB's commercialization, while the latter is likely to be adopted by most of the public service broadcasters themselves and policy-makers that hold PSB dear. Among them are the Digital Strategy Group members of the EBU, unmistakably

stating in their *Media with a Purpose* (2002) that the public service broadcasters should meet the diverse needs of all audience members and therefore remain a 'full portfolio' content provider. Thompson (2005) also believes there is still a place for 'building public value' in an era of private value and individual consumer choice, as public goods like broadcasting or national defence cannot be handled well by conventional markets. In his view, the market is not well equipped to deliver the social and cultural value of public broadcasting to the entire population. Therefore public intervention is required. Although there is much debate in most countries on the mission of public service broadcasting, no country has made the choice to really narrow the task and focus of PSB. In response to this critical debate, most public broadcasters look for arguments in favour of the full-scale model and want to stress their distinctiveness more than ever before.

Based upon empirical evidence on the programme supply (see Table 2), the present chapter will take a pragmatic look at the mission of European public service broadcasting. This look is comparative in scope, distinguishing between the two main television players in smaller and bigger markets, 'old' EU member states and 'newcomers' such as the Baltic states, and between different regions such as the Nordic countries and the Mediterranean basin, which have a strong and poor public service tradition respectively. Market failure has become the main rationale for public service media. The market failure argument goes as follows: as commercial broadcasters are mainly supplying popular programmes, an under supply of information, education and cultural programmes may be a consequence should public service media not exist. Therefore, the latter have the mission to correct market failure and to guarantee content as a public merit good. In light of the current state of media markets in many EU competitive markets, one may wonder whether market failure will indeed continue to be a valid policy argument to be supported as an institutional public arrangement.

As can be seen in Table 2, public broadcasting time mainly goes to fiction, information, news, and to a lesser degree to arts, humanities and sciences. This genre division can be noticed in all the countries under study. Irrespective of origin, fiction leads in most cases, although information and news take the lead in the programming schedules of BBC, Das Erste (ARD), La Primera (TVE), NED 1/2/3, SVT and DR. As stated before, public broadcasters tend to reinforce their public mission and legitimization in light of market failure, but how does this reflect in their programme output? After all, most commercial broadcasters also provide viewers with fiction, news, and to a lesser degree, information. When looking back at the grid, only a small portion of public broadcasting time is allocated to art, humanities, sciences and education (except for BBC2, FR2, TVE, RAI and RTBF which dedicate more air time to such content). Notwithstanding the important role public broadcasters can fulfil here, there still seems to exist a vacuum concerning the latter programme genres.

A note of caution is in place when using output analyses with very simple genre structures as in Table 2. In order to make comparisons possible, statistics may have to be categorized in ways that conceal important differences in underlying categories. Many national studies on broadcast output from public and private channels find systematic differences in character also within categories and sub-categories of content. This is not the place for a detailed

Table 2: Programme Genres of Public Broadcasters According to Size and Region.

	SIZE	Large Countries								Small Countries			
		GB		DE		FR	PL		RU	SI	CH		
Genres In % (based on hours)		BBC1	BBC2	Das Erste (ARD)	ZDF	FR2	TVP1	TVP2	Perviy Kanal	RTVSLO	SF ½ (1)	TSR ½ (1)	TSI ½ (1)
Fiction	2003	–	–	28.5	26.7	27.0	–	–	–	23.2	–	–	–
	2004	23.6	16.9	28.8	26.7	25.7	43.2	36.6	42.2	22.7	35.6	33.1	21.4
	2005	–	–	32.2	30.6	–	–	–	41.7	21.2	–	–	–
	2006	23.7	13.4	34.6	28.6	–	35.1	43.5	35.0	22.1	39.4	27.0	20.9
	2007	–	–	36.1	28.0	–	–	–	–	–	–	–	–
Entertainment	2003	–	–	8.3	8.2	15.4	–	–	–	7.3	–	–	–
	2004	10.5	22.0	8.2	6.0	16.5	3.0	9.2	10.3	8.8	5.7	2.7	8.7
	2005	–	–	6.9	5.6	–	–	–	10.5	8.1	–	–	–
	2006	7.3	18.4	4.4	5.8	–	5.4	7.1	11.4	9.4	7.7	2.8	5.3
	2007	–	–	4.2	6.3	–	–	–	–	–	–	–	–
Music	2003	–	–	1.9	1.7	1.1	–	–	–	10.2	–	–	–
	2004	1.0	1.4	1.6	1.7	1.2	3.0	7.4	4.4	8.7	7.8	0.9	1.1
	2005	–	–	1.5	1.0	–	–	–	3.9	7.5	–	–	–
	2006	0.5	2.7	1.3	1.2	–	2.9	4.9	2.5	7.9	5.9	0.6	1.3
	2007	–	–	1.6	1.3	–	–	–	–	–	–	–	–
Sport	2003	–	–	8.6	6.0	6.6	–	–	–	10.6	–	–	–
	2004	9.1	11.3	9.6	7.5	8.0	4.8	6.7	2.6	9.8	12.5	11.4	15.3
	2005	–	–	6.7	5.5	–	–	–	2.0	9.7	–	–	–
	2006	10.0	12.4	8.0	7.5	–	5.1	4.8	3.3	11.7	10.2	10.4	17.2
	2007	–	–	6.0	5.9	–	–	–	–	–	–	–	–
News	2003	–	–	10.1	10.1	13.1	–	–	–	7.3	–	–	–
	2004	31.2	6.3	9.5	9.4	12.5	7.6	6.6	9.7	8.8	8.9	12.1	20.2
	2005	–	–	9.7	9.6	–	–	–	9.4	9.5	–	–	–
	2006	30.0	7.4	9.3	9.2	–	6.6	7.7	9.2	10.0	7.1	21.5	26.7
	2007	–	–	9.4	9.4	–	–	–	–	–	–	–	–
Information	2003	–	–	33.0	–	6.6	–	–	–	20.5	–	–	–
	2004	22.2	18.5	32.2	39.0	6.4	8.9	9.0	5.8	18.8	6.9	9.9	9.0
	2005	–	–	33.4	39.2	–	–	–	5.7	20.7	–	–	–
	2006	24.4	22.9	32.5	38.6	–	12.4	9.7	6.7	20.2	6.3	6.9	9.9
	2007	–	–	33.8	40.2	–	–	–	–	–	–	–	–
Arts/Humanities/ Sciences	2003	–	–	–	–	16.8	–	–	–	4.2	–	–	–
	2004	0.8	3.5	–	–	16.1	12.5	9.4	4.3	4.4	5.4	4.4	5.5
	2005	–	–	–	–	–	–	–	3.8	4.2	–	–	–
	2006	2.8	4.0	–	–	–	7.6	7.9	3.7	3.8	10.6	9.2	8.0
	2007	–	–	–	–	–	–	–	–	–	–	–	–
Religion	2003	–	–	–	–	2.9	–	–	–	0.8	–	–	–
	2004	1.0	0.5	–	–	2.8	1.8	0.8	0.3	1.0	0.8	0.9	0.5
	2005	–	–	–	–	–	–	–	0.3	1.1	–	–	–
	2006	1.3	0.3	–	–	–	2.5	1.2	0.2	1.0	0.5	1.1	0.4
	2007	–	–	–	–	–	–	–	–	–	–	–	–
Education	2003	–	–	–	–	–	–	–	–	5.6	–	–	–
	2004	0.7	19.7	–	–	–	2.0	0.2	0.0	6.2	1.8	0.0	0.2
	2005	–	–	–	–	–	–	–	–	5.6	–	–	–
	2006	0.0	18.5	–	–	–	1.9	0.5	–	5.9	1.4	0.0	0.2
	2007	–	–	–	–	–	–	–	–	–	–	–	–
Children's programmes	2003	–	–	6.0	5.2	–	–	–	–	–	–	–	–
	2004	–	–	6.2	5.9	–	–	–	–	–	–	–	–
	2005	–	–	5.7	5.0	–	–	–	–	–	–	–	–
	2006	–	–	6.0	5.6	–	–	–	–	–	–	–	–
	2007	–	–	5.1	5.1	–	–	–	–	–	–	–	–

Genres In % (based on hours)	SIZE	Large Countries								Small Countries			
		GB		DE		FR	PL		RU	SI	CH		
		BBC1	BBC2	Das Erste (ARD)	ZDF	FR2	TVP1	TVP2	Perviy Kanal	RTVSLO	SF ½ (1)	TSR ½ (1)	TSI ½ (1)
Advertising	2003	–	–	1.3	1.3	3.1	–	–	–	3.2	–	–	–
	2004	–	–	1.5	1.5	3.0	6.9	6.0	9.9	4.4	6.0	6.9	3.0
	2005	–	–	1.4	1.3	–	–	–	11.1	5.1	–	–	–
	2006	–	–	1.5	1.4	–	0	9.6	12.6	3.5	4.5	4.6	2.3
	2007	–	–	1.5	1.5	–	–	–	–	–	–	–	–
Others (2)	2003	–	–	2.3	2.1	7.4	–	–	–	6.9	–	–	–
	2004	–	–	2.4	2.5	7.7	6.3	8.0	10.6	6.2	8.5	17.7	15.0
	2005	–	–	2.5	2.3	–	–	–	11.7	7.2	–	–	–
	2006	–	–	2.4	2.2	–	20.7	3.2	15.5	4.5	6.5	15.9	7.7
	2007	–	–	2.4	2.3	–	–	–	–	–	–	–	–
Total	2003	–	–	100	100	100	–	–	–	100	–	–	–
	2004	100	100	100	100	100	100	100	100	100	100	100	100
	2005	–	–	100	100	–	–	–	100	100	–	–	–
	2006	100	100	100	100	–	100	100	100	100	100	100	100
	2007	–	–	100	100	–	–	–	–	–	–	–	–

Genres In % (based on hours)	REGION	Mediterranean Countries							Benelux					Scand. States			Baltic States		
		ES		PT	GR		IT	NL	LU	BE				DK		SE	EE	LT	LV
										VL		WA							
		La Primera (TVE)	La 2 (TVE)		ERT1	NET (ERT TV)	RAI 1/2/3	NED 1/2/3		Eén (VRT)	Canvas/ Ketnet (VRT)	La Une (RTBF)	La Deux (RTBF)	DR1	DR2	SVT	ETV	LRT	LTV1
Fiction	2003	–	–	–	33.0	14.9	25.0	18.8	–	–	–	–	–	–	–	22.0	28.7	15.8	–
	2004	19.0	17.6	–	–	–	24.0	16.8	–	38.2	55.5	40.9	30.2	23.7	27.2	23.8	31.3	–	28.1
	2005	–	–	–	–	–	20.1	14.3	–	–	–	–	–	–	–	23.7	33.1	24.2	–
	2006	16.1	28.1	–	–	–	19.0	17.1	–	27.0	58.6	29.6	28.1	31.0	26.3	23.8	31.5	–	–
Entertainment	2003	–	–	–	26.0	1.8	19.0	7.8	–	–	–	–	–	–	–	8.4	2.8	6.9	–
	2004	5.2	3.1	–	–	–	19.0	6.9	–	8.7	3.1	2.6	0.5	2.3	0.3	9.6	3.1	–	15.0
	2005	–	–	–	–	–	22.3	6.7	–	–	–	–	–	–	–	10.8	3.2	18.5	–
	2006	6.7	2.2	–	–	–	21.6	5.8	–	8.7	3.1	2.3	1.8	5.2	1.7	11.9	2.9	–	–
Music	2003	–	–	–	4.3	2.0	0.0	3.6	–	–	–	–	–	–	–	4.5	6.2	8.4	–
	2004	1.5	2.7	–	–	–	0.0	3.9	–	2.9	3.5	0.1	7.0	9.3	2.7	4.0	6.0	–	1.4
	2005	–	–	–	–	–	0.3	3.2	–	–	–	–	–	–	–	4.7	4.9	8.4	–
	2006	1.3	3.7	–	–	–	0.4	3.6	–	2.2	1.6	0.1	1.0	5.2	1.6	3.9	4.4	–	–
Sport	2003	–	–	–	18.4	2.6	5.0	7.1	–	–	–	–	–	–	–	9.3	5.3	4.3	–
	2004	5.7	16.0	–	–	–	6.0	9.4	–	4.8	10.4	6.3	14.5	8.4	5.5	12.0	9.0	–	9.6
	2005	–	–	–	–	–	5.1	10.7	–	–	–	–	–	–	–	9.3	5.7	5.9	–
	2006	1.6	13.0	–	–	–	6.4	11.3	–	10.3	14.2	8.2	15.2	5.4	2.3	11.6	8.6	–	–
News	2003	–	–	–	11.1	23.5	11.0	24.3	–	–	–	–	–	–	–	22.0	12.3	5.8	–
	2004	29.9	2.3	–	–	–	11.0	27.4	–	15.4	0.0	11.2	6.1	9.9	5.2	17.6	8.8	–	6.1
	2005	–	–	–	–	–	9.5	31.5	–	–	–	–	–	–	–	16.2	8.2	5.6	–
	2006	29.7	1.1	–	–	–	13.3	27.5	–	13.5	0.4	34.5 (3)	11.6 (3)	10.8	6.4	11.2	7.7	–	–
Information	2003	–	–	–	4.1	50.5	14.0	30.4	–	–	–	–	–	–	–	16.3	32.6	20.6	–
	2004	4.0	8.9	–	–	–	15.0	28.2	–	22.8	19.6	3.5	0.9	35.0	38.6	16.2	30.1	–	14.9
	2005	–	–	–	–	–	13.2	27.2	–	–	–	–	–	–	–	19.3	29.9	14.8	–
	2006	4.9	10.5	–	–	–	13.4	28.6	–	28.5	15.7	–	–	32.4	40.2	25.5	32.1	[illegible]	[illegible]

REGION		Mediterranean Countries								Benelux				Scand. States			Baltic States		
		ES		PT	GR		IT	NL	LU	BE				DK		SE	EE	LT	LV
										VL		WA							
Genres In % (based on hours)		La Primera (TVE)	La 2 (TVE)		ERT1	NET (ERT TV)	RAI 1/2/3	NED 1/2/3		Eén (VRT)	Canvas/ Ketnet (VRT)	La Une (RTBF)	La Deux (RTBF)	DR1	DR2	SVT	ETV	LRT	LTV1
Arts/ Humanities/ Sciences	2003	–	–	–	1.2	2.6	16.0	–	–	–	–	–	–	–	–	13.5	6.6	5.7	–
	2004	14.8	16.7	–	–	–	16.0	–	–	6.1	6.7	2.6	6.7	4.6	11.6	12.5	6.4	–	5.6
	2005	–	–	–	–	–	14.6	–	–	–	–	–	–	–	–	12.6	8.7	3.3	–
	2006	19.2	17.9	–	–	–	15.6	–	–	7.7	5.4	–	–	3.2	13.8	10.3	8.4	–	–
Religion	2003	–	–	–	–	–	1.0	–	–	–	–	–	–	–	–	1.7	–	1.2	–
	2004	0.0	1.9	–	–	–	0.0	–	–	1.0	0.1	0.0	0.6	0.6	1.6	1.7	–	–	1.3
	2005	–	–	–	–	–	0.6	–	–	–	–	–	–	–	–	1.4	–	1.4	–
	2006	0.0	2.0	–	–	–	0.3	–	–	1.0	0.1	–	0.9	0.9	1.4	0.9	–	–	–
Education	2003	–	–	–	0.8	2.1	0.0	–	–	–	–	–	–	–	–	–	0.9	0.5	–
	2004	0.0	3.9	–	–	–	0.0	–	–	–	–	18.1	26.3	2.3	3.0	–	0.8	–	3.6
	2005	–	–	–	–	–	2.0	–	–	–	–	–	–	–	–	–	1.6	–	–
	2006	0.0	4.3	–	–	–	1.9	–	–	–	–	12.6 (4)	33.4 (4)	2.5	–	–	0.7	0.0	–
															4.1	–		–	
Advertising	2003	–	–	–	–	–	3.0	7.8	–	–	–	–	–	–	–	–	0.0	2.0	–
	2004	14.2	11.5	–	–	–	3.0	7.3	–	–	–	7.8	2.6	–	–	–	0.0	–	9.3
	2005	–	–	–	–	–	4.0	6.3	–	–	–	–	–	–	–	–	0.0	1.4	–
	2006	14.8	12.7	–	–	–	4.0	6.2	–	–	–	7.0	4.3	–	–	–	0.0	–	–
Others (2)	2003	–	–	–	1.1	0.0	5.0	0.2	–	–	–	–	–	–	–	2.4	4.7	28.8	–
	2004	5.7	15.4	–	–	–	4.0	0.1	–	0.0	1.1	6.9	4.4	3.8	4.2	2.8	4.4	–	5.1
	2005	–	–	–	–	–	8.3	–	–	–	–	–	–	–	–	1.5	4.5	16.4	–
	2006	5.7	4.6	–	–	–	4.1	–	–	1.0	0.9	5.7	3.7	3.5	2.3	0.6	3.7	–	–
Total	2003	–	–	–	–	100	100	100	–	–	–	–	–	–	–	100	100	100	–
	2004	100	100	–	100	–	100	100	–	100	100	100	100	100	100	100	100	–	100
	2005	–	–	–	–	–	100	100	–	–	–	–	–	–	–	100	100	100	–
	2006	100	100	–	–	–	100	100	–	100	100	100	100	100	100	100	100	–	–

1. SSR–SRG and SVT figures refer to TV only; 2. Presentation/Promotion/Home shopping; 3. Including Information in 2006; 4. Including Arts/Humanities/ Sciences in 2006.

Sources: European Audiovisual Observatory (2005b, 2008a).

discussion on content analysis and methodology. Interested readers can find examples from many countries where this topic is debated.

Here, only two examples will illustrate the need for caution when using condensed categories of content. For example, as illustrated above, the origin of production can be an important aspect of programming (is it a foreign production or a domestic one?); scheduling is another important aspect (prime time or not? weekdays or weekends? first time broadcast or re-run?), as are target audience groups. Public service broadcasters have obligations to serve their audiences in different ways.

One example is the yearly output study published by the Swedish Broadcasting Commission (SBC) of the main TV channels in the country. The news category consists of ten different sub-categories, the genre information is divided in 45 sub-categories, fiction has 40, and there is a category used called mixed/infotainment with 12 sub-categories. These yearly studies have established differences between the public and commercial channels in profiles, orientation and variety of schedules.[2] Another longitudinal project is carried out in Germany and it is based on the content profiles and orientations of the biggest TV channels. Over the years, these detailed analyses have reported differences between public service broadcasters and the main private channels in, for example, their news and current affairs, but also in other categories. The public channels concentrate on politics and current affairs, the latter concentrate on human interests and 'softer' news (see, for example, Krüger and Zaph-Schramm 2009, 2008).

Europe's fragmentation in regard to languages and cultures may be considered an asset, but it does have adverse consequences for the marketing potential of European audio-visual products. The smaller linguistic and cultural communities in particular find it difficult to generate enough home-made production, let alone show it outside their own borders. The Italian- (TSI 1) and French-language (TSR 1) channels in Switzerland, for example, broadcast 25.9 per cent and 27.9 per cent European originated fiction respectively, of which only 10.2 per cent and 3.9 per cent is national, as can be seen in Table 3. The imposition of a quota system is not always appreciated and it is, at any rate, no solution to the financial problems. Programmes from other European countries are often felt as 'alien', as non-European products. European countries differ with respect to the broadcasting of foreign television productions (i.e. fiction and films) originating from Europe and outside Europe. Commercial channels clearly broadcast more non-European productions than public service channels do, the differences being highest in Germany, France, the Netherlands and Sweden. An explanation often voiced by private channels broadcasting more foreign (often US) productions is that the latter are much less expensive than producing programmes themselves, and are therefore more cost-effective (Steemers 2004). Remarkably, the United Kingdom shows an opposite picture. With an average of 53.3 per cent for ITV 1 and 2 against 42.3 per cent for BBC 1 and 2, the commercial broadcaster takes the lead in broadcasting European fiction (including national) in the United Kingdom. Despite this unusual situation, the BBC maintains its strong position in transmitting national fiction in Europe (a total of 38 per cent on BBC 1 and 2 in 2005). The German PSB leads with an average of 50 per cent national fiction.

Table 3: Origin of Fiction Broadcast by Main Players According to Size and Region in 2007.

ORIGIN OF FICTION BROADCAST BY TV CHANNELS IN EUROPE 2007	*Includes TV films, Series & Soaps, TV Animation, Feature films, Short films*											
COUNTRIES	*Total (in hours broadcast)*						*EUR origin (in % based on hours)*			*Non-EUR Origin (in % based on hours)*		
SIZE	% Fiction (2006)	Total	Total EUR	Total non-EUR	% EUR incl. nat.	% non EUR +not id.	National	Other EUR	EUR & mixed co-prod.	US	Other non-EUR + not id.	Non-EUR co-prod
Large Countries												
United Kingdom												
BBC1*	23.7	2213	1206	1007	54.5	45.5	85.8	1.4	12.7	67.8	25.9	6.4
BBC2	13.4	2157	1139	1018	52.8	47.2	75.4	2.3	22.1	81.5	10.1	8.3
ITV1 Carlton Central**	19.4	1892	1424	468	75.3	24.7	80.8	0.5	18.8	91.2	3.8	4.9
ITV2	–	2904	1689	1215	58.1	41.9	82.2	0.0	17.8	91.2	1.2	7.6
Channel 4	32.4	3272	1235	2037	37.8	62.2	55.1	1.1	43.8	89.9	6.5	3.5
Germany												
ARD*	34.6	3522	2784	739	79.0	21.0	74.3	10.9	14.8	91.6	5.8	2.4
ZDF	28.6	2875	2201	675	76.5	23.5	57.9	14.7	27.1	80.4	11.1	8.3
RTL**	24.8	2839	1576	1263	55.5	44.5	84.0	0.2	15.9	72.9	1.9	25.3
RTL2		5135	600	4535	11.7	88.3	6.0	29.0	65.0	68.9	17.6	13.5
Sat.1	27.7	2369	1205	1165	50.8	49.2	72.8	2.4	24.9	90.5	2.9	6.6
Pro 7	32.1	3540	744	2796	21.0	79.0	39.2	9.5	51.2	92.1	2.0	5.8
France												
FR2*	24.1	1857	1251	606	67.4	32.6	31.4	23.3	45.2	96.7	2.0	1.0
FR3	32.9	2028	1515	513	74.7	25.3	53.5	32.4	14.1	95.7	3.5	0.9
TF1**	41.9	3541	1533	2008	43.3	56.7	34.2	46.6	19.2	83.6	3.1	13.3
M6	33.7	3245	1030	2215	31.7	68.3	27.1	53.7	19.3	89.2	2.0	8.8
Small Countries												
Switzerland												
SF 1*(German-speaking)	39.4	2030	1679	351	82.7	17.3	7.9	75.5	16.7	92.3	5.1	2.8
TSI 1 (Italian-speaking)	20.9	3503	1159	2344	33.1	66.9	6.6	38.7	54.9	77.6	11.9	10.5
TSR 1 (French-speaking)	27.0	4029	1396	2633	34.7	65.3	3.7	66.0	30.3	87.8	4.3	7.9
REGION												
Mediterranean Countries												
Italy												
RAIUno*	24.5	2154	1486	668	69.0	31.0	65.1	14.1	20.8	74.0	20.1	6.0
RAIDue	15.6	2448	835	1613	34.1	65.9	54.3	25.9	19.9	83.0	9.9	7.3
Canale5**	–	3728	1849	1879	49.6	50.4	56.2	26.3	17.4	94.1	1.8	4.2
Italia 1	–	6061	1140	4921	18.8	81.2	40.0	9.5	50.5	71.2	16.5	12.3
Benelux												
Belgium (Flanders)												
Een*	27.0	1699	1309	389	77.1	22.9	33.9	60.9	5.4	49.4	30.6	20.1
Canvas	58.6	629	522	106	83.1	16.9	3.4	67.6	29.3	76.4	14.2	10.4
Ketnet		2455	1650	805	67.2	32.8	23.2	45.3	31.5	60.2	39.5	0.4
VTM**	–	4145	2067	2078	49.9	50.1	34.3	55.4	10.3	86.2	7.2	6.6
Kanaal 2	–	3091	223	2868	7.2	92.8	15.2	25.1	60.5	73.9	14.3	11.8
VT4	–	2689	301	2388	11.2	88.8	0.7	28.6	70.8	83.3	4.0	12.7
Netherlands												
NOS1*	6.9	946	827	119	87.4	12.6	36.6	59.3	4.6	99.2	0.8	0.0
NOS2	5.9	926	786	140	84.9	15.1	23.0	57.5	19.7	67.1	27.1	6.4
NOS3	37.8	3900	3341	559	85.7	14.3	23.2	54.4	22.3	61.7	35.6	2.5
RTL 4**	–	2911	1288	1623	44.2	55.8	45.7	49.5	4.8	87.0	1.2	11.9
SBS 6	–	1804	209	1595	11.6	88.4	11.0	24.4	65.1	82.8	11.7	5.5

ORIGIN OF FICTION BROADCAST BY TV CHANNELS IN EUROPE 2007

Includes TV films, Series & Soaps, TV Animation, Feature films, Short films

COUNTRIES		*Total (in hours broadcast)*			*EUR origin (in % based on hours)*					*Non-EUR Origin (in % based on hours)*		
SIZE	% Fiction (2006)	Total	Total EUR	Total non-EUR	% EUR incl. nat.	% non EUR +not id.	National	Other EUR	EUR & mixed co-prod.	US	Other non-EUR + not id.	Non-EUR co-prod
Scandinavian States												
Denmark												
DR1*	31.0	2825	1718	1107	60.8	39.2	20.7	60.8	18.6	75.9	14.3	9.8
DR2	26.3	1256	623	633	49.6	50.4	6.6	75.9	17.5	91.6	6.8	1.7
TV2**	43.2	4413	1372	3041	31.1	68.9	13.6	61.4	25.1	93.4	5.5	1.2
TV3	-	6075	532	5543	8.8	91.2	22.4	36.7	41.4	94.9	1.2	3.9
Sweden												
SVT 1*	28.2	2519	1925	594	76.4	23.6	33.4	54.1	12.6	76.1	22.2	1.7
SVT 2	18.3	989	433	556	43.8	56.2	12.9	67.4	19.9	85.1	12.6	2.3
TV3 Sweden**	-	5574	374	5200	6.7	93.3	2.9	39.0	58.6	90.1	3.9	6.0
TV4 Sweden	-	3693	1291	2402	35.0	65.0	22.0	61.5	16.7	91.7	7.4	0.9

* Main public broadcaster
** Main private broadcaster
Sources: European Audiovisual Observatory (2008a, 2008b).

These findings tend to underline the public service broadcaster's distinctiveness when it comes to its central carrier's role of home-grown and European fiction production. This is illustrated by the fact that the supply of fiction on most public channels is more or less evenly distributed between European fiction (including national) and fiction from outside Europe. In general, however, European fiction outnumbers non-European output. On commercial channels, the opposite is true: here fiction mainly originates from outside Europe, a clear preference going to US productions. Public broadcasters air on average between 1000 and 3000 hours of non-European fiction per year. The Dutch, Flemish, Danish and Swedish public channels air notably less foreign fiction than their commercial counterparts. In Germany, Italy, Denmark and Sweden, one commercial channel airs over 4000 hours of non-European fiction per year. In the United Kingdom, we noted that commercial channels have much less foreign fiction on offer.

Broadcasters find themselves under heavy pressure to gear their programming to market-oriented factors such as price, and viewing and listening figures. Furthermore, the sensitivity to outside cultural influences and to financial pressures is a problem that not only smaller cultural communities, but also the bigger European markets are faced with.

Performance: Implications for Media Use and Public Opinion Making?

A sound relationship with the public and civil society has become of vital importance, since a relation with politics has proven to have its drawbacks. Popular support can also compensate for an all too close relationship with, or dependence on, politics. A key problem is the gradually diminishing reach of public service broadcasters among 'problematic groups' such as younger generations, migrants and the lower educated. Collins et al. (2001: 8) introduce the term 'audience universality' which is achieved 'by serving all, the poor as well as the rich, with a range of programmes, including those which may be unprofitable'.

As illustrated in Table 3, the position of the public service broadcasters on the viewer market greatly differs among countries. In the large countries (except for France) the public broadcasters stand ground against commercial competitors. The same situation holds for small countries like Austria, the Benelux (except for the French community of Belgium) and the Nordic countries. Public broadcasters in these countries continue to be major players on the broadcasting market with market shares ranging from 30 per cent up to 45 per cent. However, public broadcasters from the Mediterranean basin and the Baltic States have to leave the biggest chunk of the market to their private counterparts, ending up with a mere 15 to 35 per cent.

In many European countries which went through a period of intense deregulation, a tendency can be observed to conclude clearly defined performance agreements between the public broadcaster and the government, particularly with regard to mission and programme supply, as well as funding. Several European countries are evolving towards a more integrated approach to media policy, as is shown in successive management contracts

Table 4: Market Share of Main Players According to Size and Region.

	*TV Audience Market Share In %, 4 years + ****													
	Daily Share							*Prime Time (18:00–24:00)*****						
COUNTRIES														
SIZE	*2001*	*2002*	*2003*	*2004*	*2005*	*2006*	*2007*	*2001*	*2002*	*2003*	*2004*	*2005*	*2006*	*2007*
Large Countries														
United Kingdom														
BBC1*	26.9	11.42	25.6	24.7	23.3	22.8	22.0	28.1	28.5	27.6	26.8	25.2	24.2	23.9
BBC2	11.1	11.4	11.0	10.0	9.4	8.8	8.5	9.4	10.4	9.8	9.1	8.9	9.0	9.2
ITV1**	26.7	24.1	23.7	22.8	21.5	19.7	19.2	34.8	30.1	30.2	29.3	27.8	26.8	24.5
ITV2	–	–	–	1.1	1.5	1.6	1.7	–	–	–	0.9	1.3	1.3	1.4
C4	10.0	10.0	9.6	9.6	9.6	9.6	8.4	8.0	9.1	9.1	8.8	9.1	8.6	8.4
Germany														
ARD1*	13.9	14.3	14.0	13.9	13.5	14.2	14.6	14.4	15.2	15.5	15.9	15.4	15.5	13.4
ARDIII	13.2	13.4	13.5	13.7	13.6	13.5	15.7	15.2	15.6	15.6	15.8	15.7	15.7	13.5
ZDF	13.2	13.9	13.2	13.6	13.5	13.6	14.3	14.8	15.2	15.1	15.8	15.2	15.2	12.9
RTL**	14.7	14.6	14.9	13.8	13.2	12.8	12.9	16.2	15.8	15.0	13.5	12.9	12.7	12.4
RTL2	4.0	3.8	4.7	4.9	4.2	3.8	3.5	3.6	3.7	4.3	4.8	4.0	3.5	3.9
SAT1	10.1	9.9	10.2	10.3	10.9	9.8	8.2	10.3	9.7	9.7	8.9	9.8	8.9	9.6
PRO7	8.0	7.0	7.1	7.0	6.7	6.6	6.2	7.3	6.9	6.9	6.7	6.3	6.3	6.5
France														
FR2*	21.1	20.8	20.5	20.5	19.8	19.2	18.1	20.5	21.2	20.7	21.0	20.0	19.6	18.1
FR3	17.1	16.4	16.1	15.2	14.7	14.7	14.1	18.2	16.8	16.7	16.1	16.7	16.8	16.0
TF1**	32.7	32.7	31.5	31.8	32.4	31.6	30.7	34.0	33.7	33.4	33.4	33.3	33.1	32.6
M6	13.5	13.2	12.6	12.5	12.6	3.4	3.4	14.0	13.8	13.1	12.9	12.7	4.4	4.6
Poland														
TVP1*	24.4	25.4	25.6	24.9	24.6	24.0	23.2	24.5	25.5	26.3	24.8	25.0	25.1	23.6
TVP2	19.7	20.0	20.5	20.5	21.7	20.1	18.0	18.1	18.6	20.3	21.4	21.7	19.9	18.3
Polsat**	22.6	18.3	16.5	16.2	16.7	16.1	16.8	24.3	20.8	17.8	18.0	18.0	17.0	18.3
TV Wisla/TVN	13.9	13.9	14.0	14.7	15.0	16.7	16.5	17.4	16.2	17.1	17.3	17.7	20.9	20.6
Russia														
Pervjy Kanal (ex-ORT)*	25.7	27.2	24.3	25.7	23.0	20.3	20.2	27.7	29.4	27.6	29.4	23.9	20.7	22.4
Rossiya (ex-RTR) (1)	17.0	18.4	18.7	20.0	22.5	18.6	16.3	16.7	20.5	20.1	21.4	25.2	20.3	17.6
MTV**	17.5	13.3	12.3	11.9	11.2	12.3	13.3	19.9	13.5	12.9	12.1	11.5	12.5	14.9
CTC (STS)	5.9	6.2	8.7	9.8	10.3	9.8	8.5	5.6	6.1	8.7	9.7	10.4	11.3	8.7
Small Countries														
Switzerland (German-speaking)														
SF1*	26.5	26.7	26.0	24.8	23.8	23.7	24.1	35.1	35.4	34.9	33.6	32.9	32.2	32.6
SF2	6.4	8.1	8.0	8.9	8.5	9.7	8.2	6.1	8.4	8.1	9.5	8.6	9.6	7.5
ARD	5.5	5.8	5.7	5.7	5.8	6.0	5.7	5.6	5.9	5.8	6.0	6.1	6.1	6.1
RTL**	7.7	7.9	8.0	7.9	7.4	7.3	7.0	7.0	7.1	7.0	6.7	6.3	6.3	6.4
SAT1	5.1	6.4	5.7	6.2	6.7	6.4	6.0	4.4	4.6	4.3	4.3	4.7	4.6	4.1
Switzerland (Italian-speaking)														
TSI*	26.1	24.5	27.4	27.1	26.2	23.7	24.3	32.4	31.4	34.4	33.8	33.0	31.1	31.6
TSI2	5.4	5.1	5.6	7.0	6.5	7.6	6.2	5.4	5.2	5.5	7.1	6.4	8.2	6.0
RAI1	11.7	12.0	10.1	10.0	10.0	10.1	10.9	11.2	10.6	9.2	9.4	8.8	8.8	9.8
Canale 5**	14.7	13.8	13.1	12.9	11.9	11.6	10.9	14.2	13.8	12.9	12.2	11.5	10.2	10.1
Italia1	7.4	8.2	7.9	7.7	7.9	8.0	8.0	6.9	7.5	7.0	6.4	7.6	8.1	7.6
Switzerland (French-speaking)														
TSR1*	26.0	25.3	25.4	24.6	25.4	24.5	24.3	31.5	30.8	31.2	30.6	31.6	31.1	30.2
TSR2	5.1	5.0	5.2	5.7	6.2	7.9	6.4	4.7	5.3	5.3	6.2	6.5	8.2	6.0
FR2	9.3	9.5	9.5	9.8	9.4	8.9	8.8	7.7	8.1	7.8	8.1	8.0	7.7	7.6
TF1**	15.9	16.8	16.7	16.5	16.9	16.6	15.1	15.6	16.2	16.6	15.9	16.0	15.6	15.2
M6	8.8	9.2	9.0	9.1	8.9	9.2	9.1	9.1	9.4	9.1	9.0	8.6	9.0	9.2

	TV Audience Market Share In %, 4 years + ***													
	Daily Share							Prime Time (18:00–24:00)****						
COUNTRIES														
REGION	*2001*	*2002*	*2003*	*2004*	*2005*	*2006*	*2007*	*2001*	*2002*	*2003*	*2004*	*2005*	*2006*	*2007*
Mediterranean Countries														
Spain														
TVE-1*	24.8	24.7	23.4	21.4	19.6	18.3	17.2	24.8	26.5	24.1	21.8	19.9	18.3	16.8
TVE-2/La 2	7.8	7.7	7.2	6.8	5.8	4.8	4.6	7.7	7.4	6.5	5.8	4.9	4.3	4.1
Tele 5**	21.0	20.2	21.4	22.1	22.3	21.2	20.3	20.6	20.2	21.9	22.5	22.9	21.4	20.9
Antenna 3	20.4	20.2	19.5	20.8	21.3	19.4	17.4	20.1	19.0	18.8	21.1	21.9	19.1	16.8
Autonomic TV Channels	17.0	17.8	18.2	17.6	17.5	15.4	14.7	18.0	17.8	18.4	17.7	17.5	15.7	15.3
Portugal														
RTP1*	20.1	21.1	23.8	24.7	23.6	24.5	25.2	18.1	19.7	22.4	23.6	22.3	22.4	24.4
RTP2	5.6	5.3	5.0	4.4	5.0	5.4	5.2	4.3	5.0	5.2	4.2	4.5	4.9	4.8
SIC**	34.0	31.5	30.3	29.3	27.2	26.2	25.1	31.8	29.5	29.8	29.0	27.9	26.7	24.9
TVI	31.9	31.4	28.5	28.9	30.0	30.0	29.0	40.1	37.8	33.4	33.6	34.1	34.7	33.0
Greece														
ET1*	5.5	5.9	5.5	5.2	4.2	4.0	3.8	5.9	5.8	6.5	6.4	4.1	3.8	3.9
NET	4.0	5.0	6.9	8.8	9.1	10.1	9.6	4.3	4.4	5.4	10.2	10.4	10.4	9.7
Antenna 1**	22.9	21.8	22.5	20.8	19.4	18.0	16.5	23.3	20.6	22.5	22.4	20.8	18.4	15.0
Mega Channel	21.3	20.1	17.3	16.9	18.5	18.8	18.5	22.8	25.1	20.5	19.3	20.5	22.8	22.5
Italy														
RAIU no*	23.6	23.1	23.0	23.0	22.9	23.0	22.3	23.6	23.1	23.0	25.7	23.9	24.2	23.3
RAID ue	13.5	12.1	11.7	12.2	11.3	11.3	10.4	13.5	12.1	11.7	11.1	10.6	10.5	10.3
Canale5**	24.1	23.8	23.9	22.5	21.8	21.0	20.7	22.5	24.1	23.8	22.2	22.5	22.0	21.6
Italia 1	10.9	12.2	12.4	11.6	11.5	11.1	11.2	10.9	12.2	12.4	11.2	11.5	10.5	10.7
Benelux														
Belgium (Flanders)														
EEN*	25.0	26.4	27.9	28.2	27.0	28.7	30.1	28.0	29.5	31.3	31.8	30.8	32.2	33.5
CANV AS/ KETNET	8.5	9.6	10.0	9.4	9.4	9.6	9.4	8.1	8.2	8.9	8.4	8.1	7.8	7.9
VTM**	27.2	25.4	23.6	22.9	22.0	21.3	20.7	31.8	30.2	28.1	27.7	27.8	27.3	26.6
KANAAL 2	7.3	6.4	6.2	5.2	5.6	6.7	5.9	8.1	7.0	6.7	5.9	6.2	7.3	6.1
VT4	6.4	6.3	6.8	6.7	6.4	7.0	6.4	6.2	6.2	6.8	7.3	7.3	7.6	7.4
Belgium (Wallonia)														
LA1*	17.2	16.3	15.3	15.3	14.0	14.7	15.1	20.8	19.5	18.5	17.5	16.2	16.7	16.8
LA2	3.6	3.4	3.4	3.7	3.0	4.9	4.5	2.4	2.2	2.3	3.6	2.6	4.8	4.7
FR2	9.7	9.7	9.8	8.9	8.5	9.2	9.6	7.3	7.8	7.4	13.0	6.4	6.7	6.7
RTL-TVi**	18.9	18.1	17.9	17.9	17.9	19.1	19.3	26.9	24.9	24.9	24.6	25.6	27.3	27.1
ClubRTL	5.5	5.2	5.4	5.8	5.1	5.1	4.8	6.1	6.5	6.2	6.7	6.1	6.6	6.8
TF1	16.6	16.6	16.3	15.7	16.4	17.5	17.1	13.4	13.5	13.6	13.0	12.4	13.1	12.9
Netherlands														
Ned-1*	11.9	11.1	11.2	11.1	11.9	13.1	17.8	13.4	12.4	12.2	12.1	12.6	14.0	19.0
Ned-2	16.3	17.2	15.7	18.4	15.1	13.5	6.9	16.6	17.0	16.5	19.4	15.9	13.2	6.8
Ned-3	7.8	7.6	7.5	6.6	6.3	6.2	6.6	8.4	8.2	7.9	7.0	6.5	6.7	7.3
RTL 4	15.1	15.8	16.4	15.4	14.7	13.6	12.9	16.2	17.1	17.7	16.6	16.0	14.7	14.1
SBS 6	10.2	9.3	9.6	9.6	9.8	9.6	10.0	10.8	10.5	11.5	11.4	11.8	11.5	11.8
Luxembourg														
RTL Tele Lëtzebuerg**	15.7	(3) 15.5	(3) 12.7	(3) 14.4	14.3	13.1	12.6	52.9	54.2	(3) 50.8	(3) 52.9	(3) 53.5	44.5	42.0
TF1	9.4	9.4	8.8	8.6	9.2	8.7	11.3	5.7	5.7	5.9	6.3	6.6	8.4	9.4
RTL	11.2	11.2	11.3	9.4	8.9	6.7	6.2	6.5	7.0	7.0	4.9	4.8	4.0	6.3
Baltic States														
Estonia														
Eesti Televisioon*	17.1	18.0	16.7	18.0	17.1	17.3	16.4	23.8	22.9	22.0	22.3	19.8	18.1	17.1
TV3**	17.5	21.1	24.4	23.6	22.2	20.0	18.9	14.4	15.3	16.4	20.8	24.0	20.3	18.8
Kanal2	14.1	16.5	20.0	19.6	19.7	21.9	22.1	11.2	10.9	13.8	17.2	22.1	26.0	26.9

COUNTRIES	TV Audience Market Share In %, 4 years + ***													
	Daily Share							*Prime Time (18:00–24:00)*****						
	2001	*2002*	*2003*	*2004*	*2005*	*2006*	*2007*	*2001*	*2002*	*2003*	*2004*	*2005*	*2006*	*2007*
Lithuania														
LTV1*	9.1	12.2	11.8	12.5	13.0	14.8	13.4	12.6	14.8	13.6	13.7	14.0	15.3	13.4
LTV2	–	–	–	0.6	0.6	0.9	0.9	–	–	–	0.6	0.7	1.1	1.0
Tele-3/TV3**	25.6	23.7	25.2	27.5	25.7	24.5	26.6	27.7	25.7	26.7	28.2	26.4	26.1	27.5
LNK	24.1	15.4	28.3	26.2	24.8	23.4	22.0	25.5	27.1	31.2	28.3	28.6	27.6	27.9
Latvia														
LTV1*	14.5	13.3	13.7	13.8	12.5	11.1	11.4	21.2	20.0	20.5	21.5	18.5	16.1	15.5
LTV7	–	–	–	4.9	4.9	5.3	3.9	–	–	–	4.8	4.2	5.0	3.6
LTN**	27.5	25.4	24.0	22.1	21.0	20.4	19.0	24.5	22.4	21.5	18.9	21.0	20.5	19.3
TV3	12.1	14.4	16.1	17.1	18.5	18.4	18.0	11.7	13.7	15.5	16.8	18.7	18.4	19.1
Scandinavian States														
Denmark														
DR1*	27.6	28.4	29.8	29.9	28.0	27.7	26.5	33.5	33.9	35.8	36.3	34.0	34.1	33.2
DR2	3.3	3.7	3.8	4.2	4.7	4.7	4.6	3.7	4.1	4.3	4.6	5.1	5.0	5.1
TV2**	34.7	35.2	35.2	35.0	35.8	34.2	33.4	37.2	37.6	37.2	36.5	37.6	35.5	34.9
TV3	8.6	7.2	6.6	6.0	5.4	5.0	5.3	7.1	6.5	5.9	5.3	4.7	4.5	4.8
Sweden														
SVT-1*	25.0	26.5	25.1	24.8	24.3	21.8	19.0	29.6	32.2	29.4	30.7	28.9	28.5	28.2
SVT-2	16.9	16.4	15.0	14.9	14.4	14.5	12.5	20.4	17.7	17.7	16.4	15.2	14.2	11.2
TV3**	11.3	9.9	10.4	10.1	10.4	9.4	9.3	8.9	8.7	9.2	9.2	10.0	8.8	8.7
TV4	27.5	25.3	25.1	24.4	23.2	22.2	21.2	26.5	24.2	24.8	23.5	22.8	23.3	23.6

*Main public broadcaster
**Main private broadcaster
***Germany, Switzerland, Denmark and Sweden: 3 years +; the Netherlands: 6 years +; Luxembourg: 12 years +; Lithuania: 15 years +
****Prime time varies from country to country
(1) Partially state-owned
(2) Kanal A: figures combined from 2003.
(3) Monday–Friday, September–June
Sources: European Audiovisual Observatory (2005b, 2008a, 2008b).

between governments and the public broadcasters. Radio, television, digital applications and interactive services are increasingly looked upon as a coherent package. The next step could be that the cultural sector, education, information services and communication with the citizen – including those at regional and community levels – are included in writing public-service contracts. At any rate, it looks as if the issue of the legitimacy of public service media will increasingly crop up in the fundamental debate about public service. And despite globalization, this debate, which is primarily a social one, is still to a significant degree influenced by values and norms that differ from one region to another.

After all, the media user continues to seek specific contents, doing so consciously and purposefully. This quest can be illustrated with the example of the migrant population who are dissatisfied with the programmes supplied by the mainstream media and require additional culture-specific media input (d'Haenens 2003; Peeters and d'Haenens 2005). In view of these findings, notions such as 'pluriformity' and 'quality', which are both closely linked with the concept of PSB, must be re-examined and be effectively made operational. Whereas in the past the paternalist public broadcaster ('giving the people what they need') and the mercantilist commercial broadcaster ('giving the people what they want') used to be diametrically opposed, a newly defined concept of public service may help the individual media user to find a high-quality answer to a wide diversity of needs (see also Nikoltchev 2007). The notion of PSB could thus be widened to include the whole range of public media services that can – and may – be expected from the media in a converging and globalizing context.

It is a firm grasp of the obvious that the audience will use more platforms and channels next to the currently available open broadcast channels. This kind of viewing habits are currently already fully explored among young people who have apparently lost the routine of viewing the evening news on television as the 'main source' of information, but rather browse through the news items that are of interest to them on the Internet at the time and place of their preference. Specialists tend to converge in the conviction that these viewing patterns are not going to disappear with older age but are here to stay. The main challenges for the content- and policy-makers of public broadcasters is to decide upon what cross-media strategies and platforms need to be adopted and explored in order for them to remain full-service public communicators and not become redundant. They will need to find the tools to leave the old fashioned path of transmission and instead bring about communication in the public interest, with the public as a partner rather than a passive receiver.

Despite profound and rapid changes, the notion of quality, diversity and innovation, remain key concepts for public service. It is difficult to measure quality adequately and it varies according to whom the beholder is. It is the accumulated value of many aspects, all discussed by politicians, public broadcasters and academic researchers over the years: total output, schedules, genres, taste. In the United Kingdom, just like in other European countries, the 'dumbing down' debate concerning the lowering of the quality of the BBC TV services led to the policy of public value testing which promises to be more accountable to its distinctiveness.

Traditional and conventional measures of market shares, viewing and listening behaviour are of less and less value when determining the performance of public broadcasters. There are more and more linear viewing opportunities, blurring the distinction between original broadcasts and re-runs. On the Internet, there is an increasing number of programmes available on-demand, radio and TV, new digital services, as well as old programmes. It is becoming very complicated to put together a clear picture of, for example, the audiences of public service TV news. Formerly influential national evening newscasts lose many of their viewers. This does not necessarily mean that audiences abandon public service TV news. Instead, they adjust their use of a widely diversified output, as well as adapt to new opportunities offered to them through the Internet platform. The same reasoning goes for all broadcasters, of course.

Conclusion

Marc Raboy (2008: 364) reminds us of the primary purpose of a public broadcaster: 'To do what no other mainstream media institution can be expected to do, and that is: put aside the interests of the State and commercial investors and work to promote democratic practices.' As we are moving towards a post-broadcasting environment, 'it must do this by being at the cutting edge; it must make itself *indispensable* to anyone who wants to be informed, educated and entertained. And as we move towards a post-broadcasting environment, it must think of itself as a full-service public communicator' (Raboy 2008: 364).

The next decade will decide whether public service media as a broad, European concept has the power to reinvent itself. Some fear that the current European public broadcasting systems will converge towards a more limited, liberal model; others believe that the European diversity in media systems will continue to persist as strongly and as visibly in the digital age. Most important, however, is that the European concept of public service media – as a universal and comprehensive service, reflecting Europe's cultural diversity, and independent from both the state and the market – will still be able to be put into practice throughout Europe. As it is now becoming possible with consumer-generated content to speak up on all sorts of participatory media platforms (such as Flickr, YouTube or MySpace), the next question is: who is listening? Where can the public service media make a difference in order to create this inter-cultural, diverse public platform? The EU legal framework needs to be made future-proof. Only under those circumstances can European public service media continue to be prominent and successful actors boosting Europe's creative industries and optimally be a model for the rest of the world. Karol Jakubowicz's (2007: 44) inspiring words in this respect read as follows: 'There is no guarantee that PSM will survive in the twenty-first century. It is, however, certain that it will not survive unless it fundamentally transforms itself. Public service media need to mobilize public support for the institution and their programme of transformation [...] If they are successful in winning strong popular support and participation, and this can only be done by remaining relevant to the audience and partners among the general public, policy will take its cue from that. There is a chance of a new beginning. It must be seized.'

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Notes

1. The BBC model for determining the public value of its services (Public Value Test) is an example of how to relate the services and activities of public broadcasters to what the private market offers. All significant proposals of BBC management (to alter its domestic public service) are subject to transparent and public scrutiny (including market impact) before the BBC Trust makes its decisions (see, for example, www.bbc.co.uk/bbctrust/our_work/pvt/ Accessed 29 May 2010). For a pure market position on the relation between public service and private sector services, see, for example, Europe's big publishers' call for radical change to public service obligations; this fits the pure 'monastery model' mentioned by Jakubowicz (2003) (www.epceurope.org/presscentre/), released 10 March, 2008. Accessed 31 March 2010.
2. See, for example, the Swedish Broadcasting Commission (Swedish TV output 2008, Report no. 25). Available (in Swedish only) at www.grn.se. Accessed 29 May, 2010.

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Chapter 12

Changing Practices of Journalism

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