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**European Television Production.
Pluralism and Concentration**

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Mercedes Medina

INDEX

1. INTRODUCTION	9
1.1. Hypothesis	13
1.2. Literature review	16
1.3. Methodology	22
2. REGULATORY FRAMEWORK	25
2.1. Definition of independent producer	25
2.2. Independent production quotas	33
2.3. Audiovisual Authorities	38
2.4. Conclusions	41
3. EUROPEAN PRODUCTION MARKET	45
3.1. Audience share of leading channels	45
3.2. Independent production in the European channels	48
3.3. Ownership of European producers and television channels	54
3.4. Independent producers and vertical integration	67
4. PRIME TIME PROGRAMMING AND PRODUCTION	75
4.1. Producers of public and private channels	75
4.2. General trends in public and private programme supply	84
4.3. Production of fiction	100
4.4. Some conclusions	103
5. Summary of findings	107
5.1. Conclusions	107
5.2. Discussion	110
5.3. Proposals	113
BIBLIOGRAPHY	117
ANEXES	
Annex I. List of graphics and tables	127

C O N T E N T S

Annex II. Main European producers	128
Annex III. Prime time programming, audience and producers (2000 & 2003).....	130
Annex. IV. National consultants	158

1. Introduction

Pluralism and cultural diversity are priority values of public communication. Their presence in media content guarantees citizen rights as basic as freedom of thought and expression, and political and social participation. However, it is generally recognised that the current process of media company concentration threatens this with the risk of message and audience homogenisation (Chan & McIntyre, 2002; UNESCO, 2000; Tomlinson, 1999). As Renaud (1993: 154) suggests, it is possible to say, “market forces are not necessarily synonymous with the consumer interest”.

The individual countries and international political institutions of Europe have come to adopt diverse measures to put a stop to this undesirable eventuality. Nevertheless, it has been observed that this legislation has proved inadequate (Miège & Tremblay, 2003; La Porte & Sádaba, 2002; UNESCO, 2001). Some of these regulations have been directed exclusively at avoiding the concentration of media ownership, being limited to defending a kind of superficial pluralism that does not take into consideration the final product that is broadcast (Doyle, 2002: 132). Still, the evolution of the market has demonstrated that the increase of the number of voices does not assure plural and high quality content offerings (Council of Europe, 2002: 8).

European legislators understood that television had a fundamental function to play in the construction of a “culturally united” and democratically developed Europe (Perry: 2003). This public function that television must assume does not contradict the European way of thinking. In every country there exists public television channels that have historically served an institutional role. Thus the continued regulation of television simply means continuing a long extant tradition. Any institutional objective of the European Commission becomes, sooner or later, a Directive through a long process of

consultations and alignments of diverse opinions. In terms of the European Union, diversity has become an institutional foundation. According to the Council of Europe (2002: 6), “in Europe, cultural diversity is an integral part of European cultural identity”.

In the audiovisual sphere each country has a different set of legislation. For example, in United Kingdom a 14% obligatory level of in-house production was established in the 1950s. This allowed them to place themselves among the top exporting countries. In discussions caused by the European audiovisual debate, an obligatory 30% European content broadcast quota was fixed, excluding news, sports, game shows, and advertising. The objective was to promote national cultures through films, theatre, programmes and documentaries. Some countries opposed the measure, alleging that it was impossible to achieve that percentage due to the lack of sufficient European production (Negrine; Papathanossopoulos, 1991). According to Ward (2002: 67), “French participants in the debate about the quotas and their allies in the European Parliament, which lobbied on the quota system as the central pillar of the Directive, may have underestimated the ability of European broadcasters to produce the amount of programmes that would fill the extended transmission time made available by the growth in the number of channels”. National interests held back the timely application of the proposed objectives. Along with the quota, the EC established a limit on the number of imported programmes and facilitated the free circulation of programming.

The legal framework of European countries is fundamentally defined by the Council of Europe’s *Transfrontier Television* Convention of May 5, 1989 and by the *Television Without Frontiers* Directive adopted by the European Community on October 3rd of that same year. The members states of what was then the European Commission saw the necessity of incorporating these regulations in their own legislation. The European Directive was critiqued, above all, for trying to interfere in the cultural sphere with the excuse of strengthening the market (Wheeler: 2004). At the same time the ED was criticised because more than simply pursuing cultural goals, it pursued economic objectives in detriment to third party countries (Schlesinger; Doyle, 1995).

Any study connected with the European Union requires the gathering of an immense quantity of information and data from each country in order to compare the manner of application of European institutional initiatives in each national situation. In the end, the comparison of the legislative systems and the political realities of each country helps to implement the necessary measures for putting in practice general initiatives. The comparison itself is enriching because it helps to discover the different manners of understanding according to the political, historical and social circumstances of each country (Livingstone, 2003).

In this book this methodology is employed to uncover the different ways of understanding the boost of independent European production in the member countries of the EU and how these measures have contributed to pluralism. The study will encompass the countries of the European Union prior to 2003, when the new countries were incorporated. The study will thus cover fourteen countries. Luxembourg has been excluded due to its scarce relevance to the audiovisual sector. Its data can distort the general trends of the European market overall.

Before laying out the study's objectives, literature review and methodology, a quick explanation of television in Europe will help to understand the findings of the research (Medina, 1998: 43 - 52).

Deregulation and liberalisation of European television took place at the end of the eighties. In some cases, like France and Italy, the public channels were privatised. At different speeds new channels, created through private initiatives, appeared and began to compete with public television channels. The majority of the public channels yielded audiences to the new competing channels and in some cases ceased to be the audience leaders.

In the beginning, the need to attract large audiences in order to compete in the market led the channels, public as well as private, to resort to American production, which was cheaper and well received by the public. Little by little, thanks, in part, to the impetus of the European Directive, national production displaced American production, at least in the prime time slots of the leading channels. The television production industry started to develop. Until the

mid-nineties, save for a few exceptions, production was in the hands of the public channels. But since then some private channels began to gamble on production, either in-house or through independent producers. In almost every country national audiences received national programming with pleasure.

Though a growth of national television production has taken place in almost every European country, it has resulted in a process of concentration of production companies, and few of these generate the largest part of content for the television channels, public as well as private. Therefore, there is hardly any diversity in the programming broadcast through different television channels. So pluralism and cultural diversity has not been achieved either in each country or in the European market as a whole. Also, in many cases these production companies have close relationships with the television companies, so although there is an appearance of diversity because there is a multiple supply of channels, fundamentally, the real supply is very limited. This could be especially dangerous in a context where the number of television channels will increase thanks to the development of cable, satellite and digital terrestrial television.

The new millennium offers a different audiovisual industry panorama. Digitalisation has produced a change in the way the television market is understood. This new market is characterised by a multiplication in channels' offerings, greater possibilities of choice for viewers, and the incorporation of pay-per-view as a finance system. Although open-air channels still maintain an important presence, the growth in competition forces them to offer specialised programmes for different audiences. At the same time the need to see a return on production costs invites the search for new windows of exploitation for their products. Furthermore, in order to maintain the objectives of diversity and pluralism in the audiovisual field, as Perry points to "its belief that a thorough revision of the Directive is necessary to take account of technological developments and changes in the structure of the audiovisual market" (Perry, 2003: 7).

In the next part, the hypothesis, literature review and methodology used to develop this investigation will be laid out.

1.1. Hypothesis

The European Commission understands that the audiovisual sector has a fundamental importance for the development of democracy, freedom of expression and cultural pluralism, and contributes to technological innovation, economic growth and the functioning of the single European market (Perry, 2003). The European Commission, through the Directorate for Education and Culture Audiovisual Policy, understands that the objectives of content regulations must ensure that they safeguard freedom of expression, pluralism, cultural and linguistic diversity, and consumer protection in general and especially for minors. To achieve these objectives the Commission will seek to lower entrance barriers, maintain source variety, and develop necessary aid mechanisms when the market fails.

In this sense it is assumed that pluralism will naturally be favoured as production is originated by a larger number of production companies. The EC *Television Without Frontiers* Directive (TVWF), 89/552, establishes some criteria through which independent producers are defined and requires all broadcasters to reserve at least 10 % of their transmission time or programming budget for European works from independent producers along with an “adequate proportion” to *recent works*, in other words, those programmes broadcast within five years after production. With the aim to stimulate audiovisual production in Europe, Article 4 points out the obligation to reserve a majority proportion of their broadcasting time for *European works*. Each country adopted these criteria to their own legal frameworks. The majority maintained the same criteria as the ED, but some established other new criteria.

At the same time, it is necessary to pay attention to the crucial role that public channels play in the audiovisual market. In the *Amsterdam Protocol* (1997) it was recognised that public broadcasters are the providers of diverse quality content for European citizens, and it affirmed that the system of public broadcasting is directly related to the preservation of media pluralism. According to Doyle (2002: 153), “an important source of support for pluralism across Europe comes in the form of each country’s continued commitment to maintaining a

national public service broadcasting entity”. However, the same author also recognises other ways to reinforce diversity and pluralism, such as curbs on ownership, press subsidies and editorial agreements. On the other hand, Demandé and Chetrit (2001: 7), suggest that “the European market is also characterised by the competition between public and private broadcasters, which contribute to ensure plurality as well as cultural diversity”.

Public television channels, such as BBC, TVE, France 2, ARD, Netherlands, RAI, etc. have great experience and know-how in the production of quality programmes in the different European countries. The European Broadcasting Union considers that there is “an influence of higher-quality public service on the overall television marketplace to the benefit of all viewers” (EBU, 2004: 18).

So, to achieve the goal of pluralism in the independent production sector, it is necessary to look at the behaviour of the public and new private television channels (Debande; Chevrit, 2001: 7). The comparison of behaviour between public and private channels also serves to confirm whether public channels do in fact contribute to the achievement of quality and diversity that legitimises them and, in many countries, gives them access to special privileges. In this investigation we want to verify, among other things, if the existence of public television has really contributed to the development of independent production and to pluralism in the countries of study.

After more than ten years, the market has evolved following logical tendencies that in some cases are different from those stipulated by the regulators. Specifically, television channels and production companies have reached numerous vertical integration accords. Thus, as the *British Communications White Paper* (2002) points out, governments and audiovisual authorities will have to study whether detailed adjustments should be made to the current requirements to manage the impact which loss by producers of their independent status may have on the ability of broadcasters to meet these obligations. The second objective of this book is to see in what measure the evolution of the market has guaranteed pluralism and the strengthening of the

European production sector, and in what aspects current regulations can evolve in order to achieve those desired objectives.

At the same time, all of the European countries have adopted the European principals in favour of pluralism and diversity. In this sense, each country establishes measures to impede market concentration and positions of dominance. Generally, the measure employed to detect concentration or abuse of power in the audiovisual sector is the audience share of the national channels (Woldt, 2000; Council of Europe, 2002; Sánchez-Tabernero & Carvajal, 2003). However, it can happen that some production companies gather larger audience shares than the broadcasters, because they produce programmes for the prime time line-ups of different channels on different days throughout the week. So their power of influence in the life styles and thoughts of the audience can be even bigger than the television companies. According to Papandrea (1998: 4), “television programmes are thought to be influential in the shaping of social ideas”. This is what we call “content concentration”, and it can be calculated as the accumulative audience share of the television programmes produced by them. Some writers have proposed another concept that is “ownership of time” to measure positions of dominance in a given market (Nieto, 2000). Both serve to analyse the capacity of a company to modify public opinion according to the audience’s time devoted to the content.

Thus, the research hypothesis of this book can be summed up as follows: in order to guarantee pluralism in the audiovisual field it is also necessary to look at the power of influence of the producers of television programmes. In this research, power is identified with audience share in terms of ratings figures for television programming at prime time and the vertical integration between the producers of those programmes and the television channels or companies that broadcast them. Audience share is a measurement to prevent the development of dominant opinion-forming power, not only for news, but also for entertainment. It is supposed that if you are the author of the ideas and you get more people with your programmes, you have more possibility of influence. The reason for investing in television, apart from the economic turnover, for some corporations is to wield influence in society (Bagdikian, 1992; Gershon, 2000).

Some politicians and media managers offer more attention to the influence of the entertainment programmes in the public opinion, than the news. Entertainment programmes are watched by larger numbers of viewers than news and can be even more influential than news because they transform cultural values and ways of life of the people, though they do that slowly and unforeseeably. As the European Commission points out, “audiovisual media provides concepts and categories –political, social, ethnic, geographical, psychological and so on– which we use to render these facts and images intelligible. They therefore help to determine not only what we see of the world but also how we see it” (COM 1999). That is why the production of fiction will have a special mention in the book.

Finally, as Hendy (2000: 36) points out, “ownership remains a central question to any discussion of diversity because the desire to maximise audiences (...) in order to minimise costs”. Hence, the final aim will be to analyse whether ownership independence from production is enough to guarantee pluralism and to avoid dominant market power.

After studying the regulatory framework, we will study the structure of the European production market from 2000 to 2003 and then we will analyse the prime time programming in the leading European channels. The final conclusions will point out some proposals intended to encourage pluralism and diversity in television and new ways to guarantee the independence of content. We will seek to study the market and suggest measures that can contribute to achieving the objectives of the ED in the new industrial context, specifically, to develop a competitive and healthy audiovisual industry and to prepare to tackle the new challenges ahead and play a leading role in the creation of quality content in the new digital age.

1.2. Literature review

Technological challenges generate new dimensions of time and space that require adaptation on the part of the media. In order to be competitive, the media need resources offered only by the larger

companies, thus the consequent concentration and threat to pluralism, which is the basis of freedom of communication. So, it is understood that concentration means risks and benefits for pluralism in market terms as much as in terms of content generation.

The discipline of media economics analyses the behaviour and structure of media markets. According to Picard, “media economics is the study of how economic and financial pressures affect a variety of communications activities, systems, organisations and enterprises, including media and telecommunications” (2003: 78). Albarran also includes consumers in his definition –according to him, “media economics is the study of how media industries use scarce resources to produce content that is distributed among society to satisfy various wants and needs” (2002: 5)– and Doyle points out that it “combines the study of economics with the study of media. It is concerned with the changing economics forces that direct and constrain the choices of managers, practitioners and other decision-makers across the media” (2002: 2).

Since the eighties, most studies have focused on the privatisation of television companies and market liberalisation and their influence on television programmes and audiences. Around this subject appear three different schools of research. Firstly, the critical school that advocates media protectionism to avoid excessive concentration and to guarantee pluralism, arguing that the communication sector is an industry of great social impact. Media products must be protected because of their cultural nature, and that is how it is understood in distinctive circles and international institutions (Shaughnessy, 1990; Burgelman & Pauwels, 1992; Wright, 1994; Machet, 1998). Some of these postures consider the hegemonic position that the media holds, in line with a type of research known as Critical Theory, which gathers some Marxist approaches taken from sociology, cultural studies and political economy of the media. The authors all seem to share certain misgivings toward the market, and so defend state control. In this manner, the work carried out by Mattelart (1979), Garnham (1990), Dyson & Humphreys (1990), Mosco (1996), Golding & Murdoch (1997), Compaine (2000^{3a}) and Bagdikian (2000^{6a}), among others, seems relevant.

Secondly, the liberal school is committed to a free market of ideas that regulates itself and balances itself out. As opposed to the protectionism of the former, this market analysis of the media is carried out based on the advantages of the free market, as far as company management and media consumption are concerned. The market itself brings with it balance and pluralism in the news. As for cultural issues, the ones of the competitive market in which the media moves stand out. These authors introduce a tradition of applied research and the most liberal hold that there should be absolutely no intervention on the part of the State.

For the authors who would comprise the moderate third school, protectionism is not possible in the global context of communication. Nonetheless, neither is absolute liberalism, unless it is considered that the freedom of the agents is founded on the responsibility of achieving the common good. Along this line are found Toussaint (1996 4^a), Picard (2002 2^a), Albarran (2002), Nieto & Iglesias (2000 2^a) and Doyle (2002). Some authors have studied the market with a more practical objective in mind, that is, with the aim of influencing regulation. Specifically, the ones that stand out are Noam (1985) with his study on the implications of the growth of competition and Hendriks (1995) and Sánchez-Tabernero & Carvajal (2002) with their analysis of media concentration in Europe. With respect to international expansion and the creation of multinational media companies, it is worth mentioning the research of Gershon (2000) and Hollifield (2001). Finally, there are those that have centred on the study of a specific market, Dunnett (1990), for example; or that of one country, for example Collins, Garnham & Locksley (1989).

Pluralism and diversity in relation to media concentration has been the object of study of many academics and an object of interest for European regulators. For example, Roth (2004) has studied diversity and competition in the Dutch television market. Aslama, Hellman, & Sauri (2004) do the same with the Finnish market, and Van Cuilenburg (2003) reflects on the implications of market competition and concentration in the diffusion of culture, taking into account that television is one of the most influential mediums in culture and society. Many studies follow his outline of vertical and horizontal diversity.

In the scientific field, definitions that develop along this line also exist. For Doyle (2002) the concept of pluralism must recognise the legitimacy of every cultural option, lifestyle, ideology, policy and value proper to human freedom. Doyle defends pluralism with the following words: “the need for pluralism is ultimately about sustaining representation within a given society for different political viewpoints and forms of cultural expression” (2002: 14). According to her, pluralism is the consequence of different variables, such as technology, public policy, competitive behaviour, propensity to innovate new products that influence in the size and wealth of the market, diversity of suppliers, consolidation of resources and diversity of output.

In agreement with the postulates of the moderate school, the concept of pluralism should deal with the different levels of the communication industry such as market, production, genre, content and audience. In line with this, the European Council proposes a definition that follows this, although it refers especially to the geographical context analysed in this study. “From the point of view of media concentration, the notion of pluralism must be understood as the possibility for a wide range of values, opinions, information and interests of social, political and cultural natures to find a means of manifestation through the media. Pluralism can be internal, through a wide range of values, opinions, information and interests that find a vehicle of expression in the heart of a determined organisation in the media sector; or external, through a certain number of these organisations, each one expressing a particular point of view” (European Audiovisual Observatory: 2001)

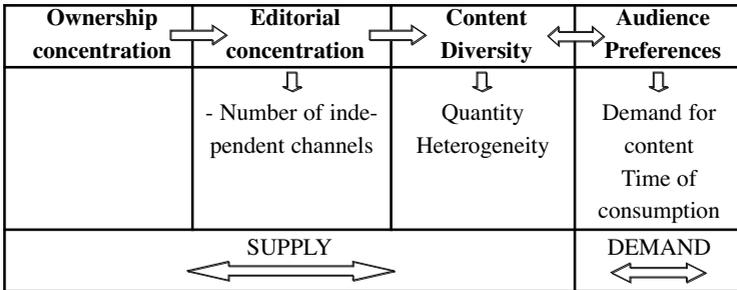
By external pluralism it is understood that the media put forth a varied offering that is not monopolistic, as a basic requirement of the market of plural ideas. In this sense, the proposals favour free market and open competition and go against monopolies, ownership or market concentration, bottlenecks, and the initial barriers that impede the entry of competitors. The myriad of channels, operators, producers, etc., seems to be a guarantee of pluralism in the European panorama.

With internal pluralism, different social sensitivities should be addressed, permitting access to media content. It is a question, therefore, of accommodating all the voices in society that are integrated by the community in which they operate.

According to these approximations, pluralism in the media can be articulated in two ways. External pluralism is related to the concentration of the market, while internal pluralism is linked to the diversity of genres, ideas and opinions in content. Nevertheless, it seems there is a very close relationship between the two. For example, the former affects the latter, insofar as a more concentrated market can limit the pluralism of its contents beforehand. However, this hypothesis has been challenged by recent studies that show that concentration only affects the financial and production levels, though not the content as much. Even if the ownership of media is concentrated, the market could allow the diversity of supply to satisfy different audience preferences. The following diagram shows the relationship between these variables.

Graphic 1.

Diversity of supply and demand



Source: our own elaboration from Cuilenburg (2003: 7).

European legislation identifies market concentration with the audience share of television channels and with ownership. So pluralism is supposed to be guaranteed when producers are independent from television channels' owners, and there is a significant proportion of their works in the television channels. There are also different companies producing television programming and not only those ones who own the media. So in fact, what we will study is the editorial concentration, in terms of independence and diversity of voices related to entertainment programme production.

According to Doyle (2002: 151), however in order to understand television market concentration it is also necessary to look at other

aspects, such as who produces television programmes and the audience share and rating of programmes produced either by independent producers, producers owned by television companies or television channels themselves.

As regards pluralism, along this moderate third stream, new variables are introduced. They explain that not only cultural matters or market factors but also other elements like the way the media itself functions, the concept the media has of itself, their editorial line, etc., require attention. Therefore, the focus of the debate moves to the media's ownership of content and the origin of this content (its production). The present study was done using this same framework.

Very close to pluralism is the concept of diversity. According to Mc Quail (1992: 144), mass media can contribute to diversity in three main ways: by reflecting differences in society, by giving access to different points of view and by offering a wide range of choice. Hence, diversity can be analysed in terms of media structure, media content and media audience. Hellman (2001: 183-184) outlines that choice at the level of media structure can be measured as the number of different kinds of television channels, and at the media content can be measured as the variety of programme types. The third level points us towards the variety of topics, life styles and ideologies behind the programmes. The same author noted, "as homogeneity between channels increased over time, an overall decline in programme" follows (Hellman, 2001: 187), as Dominick and Pearce had also concluded in their 1976 study of prime time in American networks. Busterna (1988) suggests that content quality and content diversity are respectively of each other.

Taking more into account the audience, Wurf (2004: 217) distinguishes between three types of diversity: diversity-as-sent: referring to the heterogeneity of programme types that are made available by broadcasters in a market; diversity-as-received: the heterogeneity of the programmes that audiences actually view, and diversity-as-choice, that expresses the absolute amount of different programme types that viewers can choose from. He also points out the risks for programme diversity, quality and audiences when different broadcasters adopt similar strategies (Wurf, 2004: 220).

The originality of the study that this book undertakes comes from the study of pluralism with regards to the producers of programmes. Their power will be measured by the audience that their programmes draw. Likewise, we understand that producers, that is, those who maintain control over scripts and production of programmes, can be independent producers, producers connected to networks, or equally, the networks themselves. We will save for future studies exploring in more depth pluralism centred on programme themes.

1.3. Methodology

The comparison between public and private television channels prompts a global view and lends itself to a conclusion with proposals that efficiently confront the problems posed by the current globalisation. The data used for the analysis seem sufficient to conclude them applicable to tendencies of the European audiovisual sector as a whole.

Apart from the European Audiovisual Observatory's the *Yearbook* (2003) and *Eurofiction Reports* edited by Milly Buonanno (2000; 2002) and some other European and national reports, the basic data for the study comes from the prime times of the top public channel and the top private channel of each country during one week in September 2000 and 2003—save for Greece and the Netherlands, which use 2002. This is therefore a photographic analysis, rather than an evolution through time. We will focus on prime time because it is the time with the largest audience share and where more than the half of advertising revenues are earned (Hujanen, 2002: 19). Furthermore, the programmes broadcast at prime time come from the largest producers and as Hellman (1999: 408) outlines at that time “the most attractive programme mix” is broadcast.

An expert of each country (see Annex IV) has provided the data. These experts could easily access the data we needed. For the analysis of the audience we have used rating and share data. Share is the percentage of viewers using television tuned to a particular programme or channel at a particular time and rating, the percentage of a given population group consuming a television programme at a particular moment.

It can, at times, be difficult to identify the producer of a programme. In principal we assume that the production company is that which is entrusted with developing the project from script to filming. However, it is also valid to identify the producer as the one risking capital, that is to say, the company that finances or maintains intellectual authorship over the project. Likewise, from a commercial point of view, what is important in the end is the ownership of rights to a programme's subsequent exploitation. Finally, some consultants point to the broadcaster as producer, even when programmes have been entrusted to the independent producers or have been made through co-production agreements. In the cases where we do not have a clear understanding to the contrary, we have respected the opinion of the experts.

Only entertainment programmes are taken into account, that is to say, news shows and sports broadcasts, which tend to be produced in-house, have been excluded. Also, according to the TWF ED, the proportion of European works and independent productions is calculated excluding news programmes, sports, quiz shows, teleshopping programmes, advertisements and teletext.

Pluralism and diversity are measured as a function of the variety of independent producers that produce programmes for prime time. Their power of influence is measured in relation to the rating and share that their programmes garner.

Before going on to the study of the programming of the production companies, we will briefly review the regulatory framework of each country.

2. Regulatory framework

To better understand the television production market and the role of independent producers, it is necessary to keep in mind a certain background based on legal frameworks, public channels' presence and the development of the European market in the nineties (EBU-UER: 2004).

In connection with the regulatory framework, the European Directive 89/552 *Television without Frontiers*, amended by the 97/36/EC Directive, requires that at least 10% of transmission time or of the programme budget of television channels be reserved for independent productions. It considers that a producer is independent when no more than 50% of its ownership belongs to a television company.

We will focus on the definition of independent producer, the production quotas and the audiovisual bodies of each country in order to analyse their differences and to find the best way of to regulate the market.

2.1. Definition of independent producer

With regards to commercial activity, the independent producer and the television broadcaster negotiate production conditions according to schedules, economic factors and the content of the programme. The producer, then, is not only the person who is in charge of the artistic aspects, but it is also the one who assumes all of the related functions linked to the production of a programme: the creative, financial, technical, material, artistic, and personnel aspects (Bondia, 1988). On the other hand, depending on the size and diversification of the activity of a production company, it will carry out all of the related tasks or it will entrust them to third parties.

The duty of the distributor is frequently identified with that of the seller. In the broadcast market, this would be the television channel. In this sense, it is responsible for the programmes reaching the consumers. To do so, it supposedly has information about different markets, has efficient means of transportation to preserve the quality of the programmes, carries out a publicity campaign that is clear, ample and attractive, and adapts the programmes to the markets where they will be sold. Although television channels are mainly broadcasters, historically they have also frequently assumed the role of producers, especially in Europe.

However, European legislators are conscious of the danger posed by ownership concentration on pluralism in the sector. In recent years the largest producers have aligned themselves with television companies to strengthen their position in the market. In this way, a phenomenon contrary to television production the United States has been evolving in Europe. In that country, since the origin of television at the end of the 1930s, the law prohibited television networks from producing their own programmes. Hujanen (2002: 31) points out that “American commercial networks were predominantly programming organisations and only secondly production organisations”. The main consequences of this were a guaranteed separation of broadcasting and production; the favouring of growth and diversity in the market, and the avoidance of a few companies controlling all of the industrial phases. With the liberation of markets from the nineties forward (Telecommunications Act 1996), television channels were allowed to intervene in production (Albarran, 2002). As a consequence large Hollywood producers Twentieth Century Fox and Disney, along with film distributor Viacom, acquired three national television networks, Fox, ABC and CBS respectively. According to Doyle (2002) the development of the American market is due to the vertical integration of the majors, in which elements of production like talent, technical equipment and specialised services are incorporated into the same business structure as distribution. Everything produced in Hollywood and New York arrives on screens across numerous countries, dubbed in some cases, and subtitled in others. The inequality of production with the rest of the world is growing larger every moment.

On the contrary, in Europe the process was the other way around. Following the growth and development of the broadcasting markets, and as a consequence of the formation of large multimedia conglomerates, some of the television companies began to buy part or all of the capital of the production companies.

Therefore, the concept of independence as it is understood by the European Directive *Television Without Frontiers* has seen itself come under threat. Production companies are considered independent producers when the activities of broadcasting that they carry out do not constitute their principal activity. This concept was updated by the European Commission on May 31 1995 when determining that *it would be considered that a producer is independent of television broadcaster if the television company does not own more than 25% of the production capital, or 50% if it is about different television companies, provided that, for a period of three years, the producer does not supply more than 90% to the same television channel, unless the producer has only made one programme or one series during this period of reference* (COM 1995). So independent producers can be defined according to the three criteria of ownership of the production company, the amount of programmes supplied to the same broadcaster and the ownership of secondary rights (COM 2002).

In the majority of the countries, the definition of an independent producer is included in the law that adapted the ED to the national system, and although the legislation has been updated to adapt to new technologies, it maintains the original definition.

Coming up, the legal definitions of independent producers will be shown. In order to understand the development and configuration of every country's market it can help to study how different European countries guarantee the independence of the production sector.

In Austria, a production company is not considered independent in cases where a television broadcasting company holds a majority stake in the production company. In all cases, a stake is considered a majority stake when a single television broadcasting company holds more than 25% of the company's shares or voting rights (directly or

indirectly), or when two or more television broadcasting companies hold a total of more than 50% of the shares or voting rights in the production company (Bundesgesetz über die Einrichtung einer Kommunikationsbehörde Austria (“KommAustria”) und eines Bundeskommunikationssenates (KommAustria-Gesetz - KOG) in der Fassung BGBl. I Nr. 71/2003 § 9g. (2)).

In Belgium, the independent producer has got a legal personality distinct from that of a services editor. It is not at the disposal, directly or indirectly, of more than 15% of the capital of a services editor, and it does not obtain more than 90% of its business sum during a three year period from the sale of production to one single services editor from the French Community. No more than 15% of its capital is directly or indirectly controlled by a services editor, and no more than 15% is controlled by a society that has, directly or indirectly, more than 15% of the capital of a services editor (Article: 1° number 26, Decree 27516, 27 February 2003).

In Denmark, The Danish Radio and Television Broadcasting Act, ACT No. 1052 of 17 December 2002, does not have a precise definition of independent producer. On 1 January 2003, a new law came into force (Danish Act on radio and television broadcasting, Act no. 1052 of 17 December 2002). The new act represents a significant liberalisation compared to the previous one. Though, the act distinguishes between the broadcasting and the distribution of programmes (Chapter 2) and also covers the overall regulatory framework for distribution via a planned future digital terrestrial network, nothing is said related to independent producer.

In Finland, as in neither Denmark nor Germany, there is no legal definition. In Germany there is no legal definition of independent production, and neither does the legislation provide a fixed quota for European production (Jezequel; Lange, 2000: 116). In fact, the major television producers belong to the television companies: the ARD owns two production companies, Bavaria Film GmbH and Studio Hamburg Produktion für Film & Fernsehen GmbH; RTL is the owner of Ufa Film&TV Produktion and the failed Kirch group held ownership ndf GmbH.

The obligations and commitments for terrestrial channels in France are set out in several regulations, based on article 3 of Law 2000-719 of 1 August 2000. According to this regulatory framework, to be accepted as an independent company, a production company has to meet the following criteria: the broadcaster may not hold either directly or indirectly more than 5% of the company's share capital, a shareholder of the broadcaster holding more than 5% of the broadcaster's share capital may not hold more than 20% of the share capital, and the production company may not hold either directly or indirectly more than 5% of the broadcasting company's share capital (Jezequel; Lange, 2000: 92).

In Greece, according to the Law 3166/2003 (Article: 22, Paragraph 4), the status of the producer of audiovisual works, of the shareholder, of the associate or of the member of an administrative organ of a producing company of audiovisual works is incompatible with the capacity of any person occupied in the broader public sector under any legal relationship, as the broader public sector is defined in Paragraph 2 of Article 1 of Law 3021/2002, and the capacity of the owner, shareholder, partner, member of an administrative organ or employee of an advertising company. The paragraph 5 says that the licence-holders of free reception television stations or of supply of subscription television services are obliged to observe the obligation included in the European Law to assign the production of a part of their transmitted programme to production companies that are independent from television carriers. Companies whose main shareholders are main shareholders of mass media companies as defined in Paragraph 4 of Article 1 of Law 3021/2002 are not considered as independent production companies.

The current research took place during a transitional phase for the safeguarding of the status of independent producers. The recent amendment (see Paragraph 4 of Article 22 of Law 3166/2003) of the definition of independent television producers allows private media owners to enter into contracts with the state and the broader public sector and thus repeals the incompatibility of independent producers, which was guaranteed by Article 10 of Paragraph 4 of Law 2328/1995. The Association of Independent Producers of

Audiovisual Works (S.A.P.O.E.) reacted negatively to the above amendment, on the basis that it repeals the incompatibility of the independent producer. S.A.P.O.E. aims to appeal to the supreme courts of Greece, while informing the responsible institutions of EU. The above comment shows that the situation is very complicated at the moment and this had an impact on the gathering of the data for this research. The researcher tried to get the data regarding the capital shares of the production companies from S.A.P.O.E., which responded that there are no such data available in its records, and from the companies themselves, which were reluctant to give any further information.

The law, in turn, requires that at least 25% of the programmes be aired in Greek and that 30% of foreign programmes be translated to Greek through dubbing or subtitles.

In Ireland, the independent producers are a) the persons who are to participate in the said programme; b) the persons who are to be involved in the making of the said programme, and c) the equipment and facilities to be used in the making of the said programme. Such an individual/company cannot be either a subsidiary or a holding company of a broadcaster (Broadcasting Authority 1993, 5 (a)). The act goes on to add that if two or more broadcasters hold shares in “a body corporate” or a “holding company or a body corporate” (for “body corporate” read “production company”) and can effectively appoint or remove a director of that body corporate/production company then the latter cannot be considered to be an independent production company.

In Italy, until 30 April 2001 the concept of independent production was determined by the share the production company had in the capital of a broadcasting organisation (Approvazione del regolamento concernente la promozione della distribuzione e della produzione di opere europee. Gazz. Uff. 24 Maggio 1999, Serie Generale no. 119). With the goal of determining an independent producer, the criteria of directing 90% of its own productions to one single broadcaster over a period of three years was used in the definition after it was made law (Law 122/98, Art. 3). It is said that quota must be verified with reference to the broadcaster and

to the number of productions in each one of the last three years. After this regulation, there was no mention of independence in production in the last Italian Broadcasting Law (Law Gasparri, 3 May 2004, n. 112, Norme di principio in materia di assetto del sistema radiotelevisivo e della RAI Spa nonché delega al Governo per l’emanazione del testo unico della radiotelevisione, pubblicata nella Gazzetta Ufficiale n. 104 del 5 May 2004 - Supplemento Ordinario n. 82).

The Netherlands defines independent productions that are broadcast by public broadcasters (Media Act, Section 54.2). Media Decree, Article 52k.2 defines in a similar way independent productions that are broadcast by commercial broadcasters: a) a producer that is not a broadcasting organisation; b) a producer that is not owned in more than 25% by a broadcasting organisation or in more than 50% by two or more broadcasting organisations; c) and for the debts of which a broadcasting organisation is not fully liable as partner in a company.

In Portugal the definition is a company whose main activity is to produce audiovisual shows and whose capital is not owned in more than 25% by only one television broadcast company or that is not own in more than 50% several broadcast companies (Art. N° 2, Portaria n° 1265/2001 de 2 de Novembro – Regulamento de Apoio Financeiro à Produção Audiovisual).

In Spain, an independent producer is that physical or legal entity that is *not* the object of *dominant influence* on the part of television broadcast entities for reasons of ownership, financial investment, or governing regulations. A dominant influence, either direct or indirect, is understood in the case of ownership or financial investment as: a) when television companies possess more than 50% of the production company’s capital; b) when they control the majority of the votes corresponding with shares the company gives out; or c) when they appoint over half of the company’s administrative or management positions (Art. 3, f, Law 25/1994, Adaptación de la Directiva Europea 89/552).

In Sweden, The Radio and Television Act (1996: 844) does not define independent producer. The definition comes from the Film Agreement:

an independent producer is any legal person, that is not a majority-owned subsidiary of a company whose operations involve the distribution, screening or broadcasting of cinematic works, or that does not form part of such a company (Section 19, The 2000 Film Agreement).

In the United Kingdom, an independent producer is that a) who is not an employee (whether or not on temporary leave of absence) of a broadcaster; b) who does not have a shareholding greater than [25 per cent] in a broadcaster; and c) which is not a body corporate in which any one [UK broadcaster] has a shareholding greater than 25 per cent or in which any two or more [UK broadcasters] together have an aggregate shareholding greater than 50 per cent (Broadcasting (Independent Productions) Order 1991, n° 1408).

In sum, the conditions of independent production have to do with ownership control, with limits differing from one country to another. The scale goes from 5% (France) to 15% (Belgium) and 25% in the hands of one broadcaster or 50% in the hands of two (Austria, the Netherlands, Portugal, the UK), all the way to over half of the capital, as it is defined in Spain. Other countries consider production independent when it is not owned by a broadcaster (Italy and the United Kingdom). In Greece, for example, it is considered that public companies and advertising agencies cannot be owners of production companies. In other cases independence is established in terms of non-exclusive broadcasting rights. This is the case, for example, of Belgium, which established that a producer is independent of a network when it cannot obtain more than 90% of its revenue from the sale of its productions to one single channel. In Italy a production agreement (90% over three years) is stipulated. Sweden defines independent producer in terms of distribution: the majority of a company's shares cannot belong to a distributor, exhibitor or a broadcaster. Other countries like Ireland and Spain stipulate independence in terms of the appointment of managers. Lastly, there are some countries, like Denmark, Finland, and Germany, where no legal definition of independent production exists.

Table 1 pulls together a schematic of the different understandings of production independence with respect to broadcast in each of the countries under study.

Table 1.

Legal independent producer definition

Conditions	Limits	Countries
Independent ownership	5%	France
	15%	Belgium
	25%	Austria
	50% two broadcasters	The Netherlands Portugal The U.K.
	50%	Spain
No broadcaster share	Italy/United Kingdom	
No distribution share	Sweden	
Incompatible owners: public sector, advertising agencies	Greece	
No exclusive broadcasting rights	Belgium/Italy	
Independence to appoint or remove director	Ireland/Spain	
No legal definition	Germany/Finland/Denmark	

Source: our own elaboration.

The different definitions of independent producers all respond to the objective of separating broadcast from distribution, with the aim of avoiding positions of dominance. Each country has decided to establish conditions that favour producer independence in the face of broadcasters. This market study will allow us to deduce the measures that have best favoured the development of independent production.

2.2. Independent production quotas

European Directive 89/552, *Television Without Frontiers* (art. 5) obliges the operators to ensure that at least ten per cent of programming, excluding the time allotted to news, sports events, game shows, advertising, teleshopping and teletext services, consists of the broadcasting of

European works created by producers who are independent of broadcasters, and in addition, that these works have been produced in the last five years.

Following Article 5 of the European Directive, *Television Without Frontiers*, in some countries the law establishes that, in place of a transmission time obligation, broadcasters have to invest part of their revenues in independent production. Quota percentages are also different in some countries.

In Denmark the public channel DR (Denmark Radio) has the obligation to include 21% independent production in the programming it airs. According to Trappel and Meier (in McQuail; Siune, 2004: 197), “the national broadcaster TV2, which includes eight regional companies, is obliged to contract the major part of its programming – with the exception of news, current affairs programmes and sports – to independent production firms”.

In Finland, the public channel YLE was entitled by law to use a part of its revenues to support independent producers (Hujanen, 2002: 97). In 1993 there was the *Big Channel Reform* that was based on “contract relation in which programming was responsible for the definition of goals according to the audience and resource allocation, and production for delivering the agreed contents” (Hujanen, 2002: 69). The BBC’s Producer Choice was copied and management strategy by schedule was added. As a consequence, docusoaps were produced because a careful study of schedules shows that there might be a competitive audience for a more dramatised form of documentary series. However, many producers did not want to make docusoap because they were afraid that their rights and artistic views become underestimated (Hujanen, 2002: 89).

According to Levy (2001: 23-24), “France is the country where legislators and regulators probably devote more attention (...) to the promotion of national programming and culture within the broadcasting system”. Programming quotas are complemented by investment quotas where television stations must choose whether they prefer to invest: either 15 % of their turnover in French audiovisual productions and 20 % in European audiovisual works, or 15 % of their turnover in French audiovisual works and broadcast a minimum of 120 hours of European/French audiovisual works in prime time.

In Germany and Greece the law drives internal pluralism and European production. In Germany, there are some *länder*, such as Hamburg, Bremen and North-rhine-Westfalia, where internal pluralism at the programme level is also required, in particular balanced and broad coverage of different points of view (Trappel; Meier, in McQuail; Siune, 2004: 197). In Greece 25% of programming is required to be of European origin, a percentage likely to increase to 45% in the coming years.

In Ireland, the relevant legislation in this respect is the Broadcasting Authority (Amendment) Act of 1993 which places a requirement on RTE, the public service broadcaster, to spend at least 20% of its production budget on independently produced programming. Prior to this RTE was under no obligation to outsource any of its programming material, and while RTE purchased much of its programming from US, UK and Australian producers, it commissioned very little material from Irish independent production companies. In response to the 1993 Act RTE established the Independent Production Unit, an in-house unit that commissions programmes from production companies outside of RTE.

In Italy, the national television broadcasters as a rule reserve at least 10% of broadcasting time for European works by independent producers, excluding time devoted to news, game shows, advertising, teletext services, talk shows and teleshopping. The public-service concession holder reserves a minimum quota of 20% for such works. Law 122/98 (art. 2) requires them to invest, through purchase or production, no less than 10% (20% for RAI) of their net annual advertising revenue in European works, including works from independent producers.

In the Netherlands, according to the Media Law, Section 54.2, at least twenty-five per cent of the total broadcasting of national public broadcasting must be devoted to independent works. At least seventeen and a half per cent of the total broadcasting time of each television programme service network must also be devoted to independent works. According to the Media Decree, article 52.k, commercial broadcasters must devote at least ten per cent of their television programme service to programmes produced by independent producers. In January 2002, however, the Policy rules for programme quotas came into force. These set out the policy for enforcement of the rules for programme quotas.

One of the aims of these rules was to optimise reporting methods. Under the Rules, from 2002 on, broadcasters have been required to report on all programmes transmitted during a period of four weeks selected by the Media Authority. All broadcasters have to report using a form drawn up by the Media Authority.

In Portugal, accord to the Law no. 32/2003, of 22 of August, Published in the D.R. n.º 193 (Series I - A), television operators which run television programme services with national coverage shall ensure that at least 10% of their respective programming, excluding the time appointed to news, sports events, games, advertising, teleshopping and teletext services, is filled with European works, created by producers who are independent of television operators, and produced less than five years ago (Article 42).

The accord signed by the number two public television channel RTP and the production association in 2003 is surprising. According to the agreement the production companies will produce or coproduce the programmes selected by RTP and will cede the broadcast rights to the network. Both sides will jointly make decisions on budgets and themes, but the ultimate responsibility for production and broadcast will rest with the network. This accord foments audiovisual production, but it also endangers the independence of producers and endangers pluralism.

With respect to production, in Spain, as in the European Directive 89/552, 51% of annual airtime must be reserved for European audiovisual works (art. 5) and a minimum of 10% of total airtime must be reserved for recent works (within 5 years) from producers independent from the television networks (art. 6, Law 25/1994). Furthermore, in Spain law 22/1999 also seeks to strengthen the film industry requiring that 5% of both public and private broadcasting revenues must be invested in the production of Spanish films (art. 12).

In Sweden, unless there are special reasons to the contrary, a person or entity that broadcasts television programmes by satellite or under a licence issued by the Government must ensure that more than half of the annual broadcasting time consists of programmes of European origin, and at least 10 per cent of the annual broadcasting time or at least ten per cent of the programme budget consists of programmes of European origin made by independent producers. The proportion of programmes

produced during the preceding five years should be as high as possible. For the purposes of this section, "broadcasting time" is defined as the time when programmes with a content other than news, sport, competitions, advertising and programme services are broadcast, as referred to in Chapter 7, Section 5, third paragraph (Act 1996: 844).

Swedish regulation is unique with regards to fomenting pluralism. Broadcaster permits stipulate that broadcast content must be produced in different parts of Sweden and not just in Stockholm. Distinct from other European countries, SVT's permits specify that the share of independent productions should be kept on the same level as in 2001 and must not increase. One requirement that applies for both channels is that they must support Swedish film production. The public service must also supply at least 55% of its own production and must produce programming for Sweden's ethnic minorities. According to the law, television broadcasts must contain a considerable proportion of programmes in Swedish, along with programmes with Swedish artists and works by Swedish authors, unless there are special reasons to the contrary (Act 1998:1713).

In the United Kingdom, the Broadcasting Act 1990 requires the BBC, ITV, Channel 4 and Channel 5 to devote at least 25% of the time allocated to qualifying programmes (broadly non-news programmes) each year to the broadcasting of a diverse range of independent productions. The Communications Act of 2003 ratified the percentage and specified a level of "not less than 25 % of the total amount of time". Broadcasters will also be expected to publish tariffs for primary rights and their distribution arms will have to work on an "arms length" basis when negotiating to acquire secondary and ancillary rights. According to Television Business International's *yearbook* (TBI: 2004: 122), "there is a widespread consensus that the new framework will encourage a process of consolidation among the fragmented independent production sector".

Again, each country adopts the obligation to foment independent production in a different manner. Some compute broadcast time (Sweden, Spain, Italy, the United Kingdom), others use advertising revenues (France, Italy) or just revenues (Finland) and the rest simply mention "programming" without specifying. Quotas also differ from the minimum stipulated by the TWF ED, especially in the case of public channels. Some

countries consider that these channels have a special obligation to boost independent production and thus establish higher quotas: Denmark (21%), Ireland (20%) Italy (20%) and the Netherlands, with 25% of total national public broadcasting or 17.5% of each television programme service network. Lastly, France establishes a higher quota for both public and private channels, and at the same time specifies that independent production be aired during prime time. Some countries, like Germany, Greece, Belgium and Sweden, establish additional measures to favour pluralism and the performance of public service obligations.

As we will see later, in the last fifteen years every country has reached and surpassed this minimum. Discovering how, and what their implications are, will be studied in the following chapters. The biggest difficulty for member countries of the EU has not been fulfilling the stipulations of the law. In the majority of the cases efforts have been concentrated in creating mechanisms of control and computation for the quotas. As a consequence, in the majority of the countries audiovisual bodies have been developed to carry out this function (Papathanassopoulos, 2002: 25-28). In many cases they are independent of the government and represent different professional sectors. In some ways this suggests a progression toward liberalisation and the maturity of the markets. In the last section of this chapter the relation between these organisms and the countries under study will be explored.

2.3. Audiovisual authorities

In every European states, but Spain and Luxembourg, there is an audiovisual authority to implement the law and to safeguard the free competition in the market. According to the *Principles and Guidelines for the Community's Audiovisual Policy in the Digital Age Communication* (COM 1999: 3,6), there are certain common guidelines for the development of this regulatory authorities in the audiovisual sector: a) they should be independent of government and operators; b) content issues are essentially national in nature, being directly and closely connected to the cultural, social and democratic needs for a particular society; content regulation is primarily the responsibility of member states; c) technological convergence

requires increased co-operation between the regulators concerned (communication infrastructures, audiovisual sector, competition), and d) regulatory authorities can contribute to the development and implementation of self regulation.

In the references the website addresses of the national audiovisual authorities described below are attached.

In Austria, the Komm Austria, or the Austria Communications Authority, has the objective of assuring diversity of opinion, promoting programming quality and the technical requisites for its growth, and develop a structure for a dual market. Belgium has two organisations, one for the Flemish region, Vlaams Commissariaat voor de Media, and another for the Francophone region, the Conseil Supérieur de l'Audiovisuel de la Communauté Française.

In France the Commission Nationale de la Communication et des Libertés (CNCL) was created to co-ordinate all televisual activity, and was then replaced in 1989 by the Conseil Supérieur de l' Audiovisuel (CSA). Denmark has the Radio and Television Board, and in Finland there is the Finnish Communications Regulatory Authority (FICORA).

In Greece the Constitution of 2001 created the National Council of Radio and Television. Germany has got media authorities and regulatory agencies divided in länders: Hessen, Hambourg, Bayern, Mremen, Westfalia, Berlin, Branderbourg and Bavaria. In Ireland, under the terms of the Broadcasting Act 2001, the Independent Radio and Television Commission has been replaced by the Broadcasting Commission of Ireland (TBI, 2003: 74). In Italy the law of July 31, 1997 created the Autorità per le Garanzie nelle Comunicazione (AGCOM). In its reports on social and political pluralism it has denounced the dominance of the Mediaset Group and its governing bodies, above all because of its ownership and control over the public networks, three private channels, the production company RTI, and advertising sales company Publiespaña¹.

¹ Decision of the AGCOM of 26 June 2003, no. 226/03/CONS, Proceedings to verify the existence of dominant positions in the television sector pursuant to art. 2, paragraph 7 of Law no. 249/97, Official Gazette of 2 August 2003, no. 178, ordinary supplement no. 126.

In the Netherlands the Commissariaat voor de Media regulates important television issues, especially with regards to ownership control and pluralism. In 1997 the Comissão Inter-ministerial para o Audiovisual (CIMA) was created in Portugal, which was later converted into the Alta Autoridade para a Comunicação Social (AACS). Among other things, the commission proposed that aid mechanisms be created for the independent production of fiction, documentaries and other television programming of an artistic and cultural nature.

In Spain the Royal Decree 6/1996 of June 7th created the Telecommunications Market Commission (CMT). It took the aim of promoting competition in the audiovisual market according to its regulatory legislation, to settle disputes that may arise between operators and, if necessary, acting as an arbitrator in those disputes and to be the establishment and supervision of the specific obligations imposed on operators in the telecommunications market. In practice, however, the CMT has focused more on issues related with telecommunications than with television (Fernández Beamont, 2003: 155).

According to the website, the Telecommunications Market Commission (CMT) is the *independent* Spanish body responsible for regulating the telecommunications and audiovisual service markets. However, as it also points out in the web that it is a public body attached to the Ministry of Science and Technology through the State Secretariat for Telecommunications and the Information Society that acts as a coordinator between the CMT and the Ministry. Hence, it is not as independent as it is outlined.

The goal of the Swedish Radio and Television Authority is to promote the possibilities of diversity in radio and television broadcasting by being responsible for all licensing under the special legislation on radio and television transmissions to the general public, insofar as these tasks do not infringe on the Government or any other specially appointed authority. There is also a Swedish Broadcasting Commission that examines transmissions of foreign channels distributed by satellite to the Swedish public. It also conducts research projects on radio and television content (TBI, 2004: 119).

In United Kingdom since 2004 a single regulator, Ofcom, has brought together all of the ruling commissions that deal with communications industries, with responsibilities across television, radio, telecommunications and wireless communications services. Ofcom exists to further the interests of citizen-consumers as the communications industries enter the digital age. To do this Ofcom shall balance the promotion of choice and competition with the duty to foster plurality, informed citizenship, protect viewers, listeners and customers and promote cultural diversity; to serve the interests of the citizen-consumer as the communications industry enters the digital age; to support the need for innovators, creators and investors to flourish within markets driven by full and fair competition between all providers and to encourage the evolution of electronic media and communications networks to the greater benefit of all who live in the United Kingdom. The Ofcom Review of Public Service Television Broadcasting (2004) points out that plurality is related to a wide range of producers. Moreover, it considers that to encourage plurality in production more effective competition in the programme supply market is needed.

Most countries have an audiovisual authority with responsibilities in the audiovisual sector overall, that is to say, public and private television channels, independent production sector and telecommunication operators. However, most of them rather than independent, they are very closed to the national governments and very few of them has got regulatory responsibilities.

2.4. Conclusions

The study of legal frameworks demonstrates the profound diversity that exists in Europe. Although the TWF ED establishes some minimum rules of conduct, each member country applies them in accord with their own specific circumstances. It is important not to forget that the structure of the market does not depend solely on the European legal framework. Historical circumstances and the cultural, economic, politic, legal and personal elements of each country play a fundamental role in the establishment of a common legal framework

and in securing a single market. Although these last 15 years have witnessed important improvements, the peculiarities of each country underline deep internal differences within the EU.

With respect to the definition of an independent producer, the ED TWF 97/36, which modified the first directive, establishes in number 31 that “the member states must properly take into account such criteria as the ownership of the production company, the quantity of programmes supplied to the same television broadcaster, and the ownership of rights for future exploitation.” At the same time, as we have seen, some countries also consider the decisions that affect the appointment of directives.

The minimum quotas for independent production vary from one country to another and vary between private and public channels. A common criterion for the calculation of these quotas has still not been arrived at. Article 5 establishes that 10% of broadcast time, or alternately, a minimum of 10% of the programming budget must be set aside. There are still some states that make calculations based on general revenues or advertising revenues in particular. The criteria adopted by each country makes comparisons of investment data difficult, since it is likely that many channels use the most convenient criteria that allows them to fulfil the requirements of the law. But that measure may not be a real indicator of independent production growth. However, as the Commission’s sixth communication indicates, “despite these differences, the results exhibited allow for the recognition of tendencies in this field and for the extraction of conclusions about the effectiveness of the adopted measures” (COM 2004). According to Levy (2001: 43), the producers’ lobby, who hoped to profit from the production opportunities that would be created, drove this article’s creation.

Finally, controls are in the hands of independent regulating entities in some cases, and in the hands of public organisations connected to national governments in others. The methodologies of application and interpretation of regulations vary from one country to another, which complicates comparative analyses of the sector. The market’s development has moved at different speeds in different countries. In

the cases of countries where television privatisation and the development of independent production has been slower –like Greece or Ireland– obtaining rigorous data is more difficult than in other countries like the United Kingdom or France, where there exists a longer tradition of regulatory authorities and control over the audiovisual market and companies.

Specifically, the desire to construct a European audiovisual market to face the threat of American products explains why different European countries have developed their markets in similar ways but with different structure. The differences at the heart of the European Union are the definitive sign of Europe as one. It is a singular market with fundamentally intrinsic differences in the audiovisual sphere.

3. European production market

In order to understand the role of independent producers in the European audiovisual market it is necessary to know the market's dimensions. The following section will explore in what measure internal pluralism is demonstrated by the programme offerings of the channels under study, but right now it is worth taking a break to consider some external variables that will help us to understand the levels of pluralism and production company concentration in each country. It will also help to explain the behaviour of public channels in relation to independent production companies, in comparison with commercial channels.

Thus, in the coming section three variables will be studied that will help make sense of the conclusions that follow. We will pause to analyse the audience share of the leading channels, the independent production quota that each one of these channels has reached in the last decade, and who are the principal national production companies in each country and their owners. On this last topic it is also interesting to learn if the companies are integrated with television companies. The partial conclusions of this chapter will lead us to note the advantages and inconveniences of vertical integration in order to develop a more competitive European audiovisual market.

3.1. Audience share of leading television channels

European television has changed completely in fifteen years. The number of channels has multiplied, and the majority of the countries have gone from having one or two public channels to offering multiple open-air channels. The audience has become fragmented; the public channels that maintained a monopoly in 1990 and accumulated over 75% of the total audience have lost audience share to private channels. Audience distribution has become oligopoly in the majority of the countries. The top channels divide audiences and advertising revenues in such a way that it is difficult for one single channel to surpass 25% of the national market.

Table 2 shows market shares in terms of the audiences of the channels that we have selected for study, the top public channel and the top private channel of each country. The comparison of the average audience of these channels with the audience garnered by prime time programmes will permit us to draw conclusions about who enjoys greater audience concentration, the channels or the production companies. The table collects data from 1992, when private television channels were established in the market, and from the two years of our chosen sample, 2000 and 2003.

Table 2.

Market share of leading channels

COUNTRY	TV CHANNEL	NAME	1992/3	2000	2003
			%	%	%
AUSTRIA	PUB	ORF 2	32.1	32.9	30.0
	PRIV	RTL	5.7	6.2	5.9
BELGIUM	PUB	TV1	25.9	23.3	27.2
	PRIV	VTM	38.6	28.3	26.4
DENMARK	PUB	TV 2	54.0	36.0	38.0
	PRIV	TV3	9.0	13.0	11.0
FINLAND	PUB	YLE 1	45.9	22.6	23.0
	PRIV	MTV 3	40.0	40.4	39.1
FRANCE	PUB	France 2	26.0	22.1	20.8
	PRIV	TF1	41.0	33.4	32.7
GERMANY	PUB	ARD	18.2	13.7	14.0
	PRIV	RTL	14.4	14.2	15.4
GREECE	PUB	ET1	10.5	6.4	6.1
	PRIV	Antenna TV	30.6	21.8	23.1
IRELAND	PUB	RTÉ	45.0	25.4	24.1
	PRIV	TV3	n.a.	8.0	10.7
ITALY	PUB	RAI 1	19.0	22.8	23.7
	PRIV	Canale 5	19.6	21.2	22.5
NETHERLANDS	PUB	Nederland2	17.3	17.4	17.0
	PRIV	RTL 4	28.5	14.9	17.1

Table 2.
Market share of leading channels (cont.)

COUNTRY	TV CHANNEL	NAME	1992/3	2000	2003
			%	%	%
PORTUGAL	PUB	RTP 1	66.3	28.5	23.6
	PRIV	SIC	11.8	48.1	35.3
SPAIN	PUB	TVE 1	33.1	24.5	24.7
	PRIV	Tele5	21.8	22.3	20.2
SWEDEN	PUB	SVT1	27.0	20.0	27.0
	PRIV	TV4	26.0	27.0	25.0
U. KINGDOM	PUB	BBC 1	32.0	27.5	26.0
	PRIV	ITV One	37.0	30.0	22.7

Sources: Carat (1994) and national consultants.

The most widespread tendency is the loss of audiences from the public channels. The difference from 1992 to 2003 is extraordinary. If the audience data from 1992 is compared with 2003 it is apparent that the majority of public channels have lost audience shares. The most significant cases are the public channels of Finland and Portugal: YLE1 lost twenty points in ten years, and RTP lost forty. Only ORF2, TV1, RAI1, Nederland 2 and SVT1 maintain similar audience shares. In Portugal the private channel SIC has taken advantage of RTP's fall, gaining twenty points over the same period. Some private channels have also suffered audience losses. Such is the case for TF1 in France, Antenna TV in Greece, RTL 4 in Netherlands and ITV in the United Kingdom. The 1992 audience data for Ireland's TV3 are not available because the channel began operations in 1997.

From 2000 to 2003 over half of the channels lose several share points. Portugal's case is especially relevant, since both its public channel (RTP) and its private channel (SIC) lose respectively five and three share points. Some channels, however, increase their audience in these years, specifically the public channels of Denmark, Belgium, Finland, and Sweden and the private channels of the Netherlands, Greece and Spain. In Germany both the public and private channels increase their audience share. The most significant difference is that of the Swedish public

channel (SVT1), which in three years regained seven points. In Sweden the public channel with the largest audience in 2000 was SVT2, with 24%, due to the reduction of SVT1's audience because of the broadcast of the Olympic Games. All the same, the first channel has been chosen for study in both years in order to make a comparison. In Spain in 2002 the two private channels Antena 3 and Tele 5 had the same audience share of 20.1%, but Tele 5, the leader in 2003, has been chosen.

The public channels' average audience in 2000 is 21.78%. Austria, Belgium Denmark, Finland, France, Ireland, Italy, Portugal, Spain and the United Kingdom are above the average. Some, like ORF 2 and TV2 in Austria and Denmark, display averages greater than 30%. At the same time the public channels of Germany, Greece and the Netherlands accumulate, respectively, 13.7%, 6.4%, and 17.4%, the lowest ratings. With regards to the private channels, whose average (23.48%) surpassed that of the public channels in 2000, VTM in Belgium, MTV in Finland, TF1 in France, SIC in Portugal, Tele 5 in Spain and ITV in the UK earned audiences above the mean. The average audiences of MTV 3 in Finland (40.4%) and SIC in Portugal (48.1%) are especially significant. However, two years later the audience share of SIC declined when refused to carry *Big Brother* (TBI, 2004: 99).

In 2003 the overall average of the public channels is higher (23.23%). ORF 2 in Austria and TV 2 in Denmark continue to garner higher shares. On the other hand, the average audience of the private channels fell two points to 21.94%. MTV 3 in Finland and SIC in Portugal continue to be noteworthy, despite the three year audience loss.

The upcoming chapter sets out the programmes that contribute to the audiences earned by the broadcasters. Before that, in the following section we will examine in what measure these public and private channels have contributed to the development of independent production in their respective countries.

3.2. Independent production in the European channels

The independent production sector has grown in the nineties. It's growth and maturity is due to the impetus of the TWF ED and to the increase in

the number of television channels. The audience has very positively received domestic produced programmes, and the growing demand for programming has contributed to strengthening the business projects of the production companies, which have gone from producing one programme per year to producing at least three or four, with some able to specialise in specific genres. At the same time a set of associations has been formed with the aim of protecting the interests of both film and television producers. Examples of them are APT (Associazione Produttori Televisivi) in Italy, FAPAE (Federación de Asociaciones de Productoras Audiovisuales de España) in Spain, SAPOE (Association of Greek Independent Audiovisual Producers) in Greece, APIT (Associação de Produtores Independentes de Televisão) in Portugal, Bundesverband Deutscher Fernsehproduzenten in Germany and PACT (Producers Alliance for Cinema and Television) in Great Britain.

The following table indicates the percentage of independent production in both the public and private leading channels' programming. Studying it permits us to see the evolution and growth of the sector, since it provides data from 1992, 2000, and 2002. Also, by comparing it with the tables that follow, the importance of independent production in daily programming can be deduced, along with the importance given to this type of production by its inclusion in prime time.

The table is made from data from the First, Fifth and Sixth Communication from the Commission to the Council and the European Parliament on the application of Articles 4 and 5 of Directive 89/552/EEC *Television Without Frontiers*, as amended by Directive 97/36/EC (COM 1994 -2002). The data from 1994 display the behaviours of the channels in the early nineties. Some data are not available because compilation of information was still very rudimentary at that point, and because many channels did not yet exist or were recently created. In the majority of case the data refers to broadcast time, save in the case of France, where it refers to programming budgets.

In 1992 the channels that contributed data respected the 10% minimum independent production quota, save for Portugal's RTP, Ireland's RTE, and the Spanish channels. It is interesting to see how

the proportion of independent production grew in some channels and, in contrast, diminished in others like Belgium, France, and Greece from 1992 to 2000. Just like the period from 1992 to 2000 the difference is greater, from 2000 to 2002, in the majority of the cases. The tendency to contract works from independent producers remained stable, save for a few exceptions like the public channels of Belgium, Denmark, Sweden, Portugal, and the United Kingdom, whose proportions went down.

Table 3.
Proportion of independent production

COUNTRY	TV CHANNEL	1992	2000	2002
AUSTRIA	ORF 2	n.a.	30.3%	33.5%
	RTL 4**	n.a.	55.0%	67.0%
BELGIUM*	TV1	n.a.	20.0%	12.5%
	VTM	82.1%	65.0%	63.0%
DENMARK	TV 2	77.2%	98.0%	84.7%
	TV 3	n.a.	Na	n.a.
FINLAND	YLE1	n.a.	28.0%	23.0%
	MTV3	n.a.	27.0%	34.0%
FRANCE	France 2	33.9%	15.1%	15.4%
	TF1	20.4%	14.8%	15.1%
GERMANY	ARD	+ 10%	43.5%	40.9%
	RTL 4**	+ 10%	55.0%	67.0%
GREECE	ET1	n.a.	13.5%	15.0%
	Antenna TV	32.2%	28.5%	28.0%
IRELAND	RTÉ	9.0%	18.0%	18.0%
	TV3	n.a.	19.0%	15.0%
ITALY	RAI 1	10.4%	17.6%	19.1%
	Canale 5	n.a.	14.0%	14.7%
NETHERLANDS	Nederland2	25.0%	47.0%	45.0%
	RTL 4**	+ 10%	55.0%	67.0%

Table 3.
Proportion of independent production (cont.)

COUNTRY	TV CHANNEL	1992	2000	2002
PORTUGAL	RTP 1	6.0%	42.2%	22.0%
	SIC	n.a.	18.6%	20.0%
SPAIN	TVE 1	6.0%	36.1%	35.4%
	Tele5	7.0%	50.2%	49.6%
SWEDEN	SVT1	n.a.	20.9%	15.5%
	TV4	n.a.	64.4%	58.0%
U. KINGDOM	BBC 1	14.5%	20.0%	13.0%
	ITV One	16.6%	28.0%	29.0%

*Flemish community ** From RTL Germany

Sources: COM 1994-2004

Despite the growth of national programme production, in some countries like France and Ireland the increase has been produced almost entirely by the broadcasters, since the proportion of independent production between both of the two channels does not surpass 20%.

The limited proportion of independent production in French programming in 2000 (15.1% in France 2 and 14.8% in TF1) is surprising taking into account that it is one of the countries with the highest representation of independent producers in prime time. Perhaps the explanation lies in the French numbers referring to budget percentages instead of broadcast time like in the rest of the countries. Neither one of the two channels satisfies the quota stipulated by French law.

Some channels demonstrate a clear strategy favouring independent production, since the proportion of independent works surpasses 55% during the three years studied in the cases of VTM in Belgium, TV2 in Denmark, RTL 4 in Germany, Netherlands and Austria, and TV 4 in Sweden. This mark is especially telling in the case of RTL 4, since as we will see later, it is a broadcaster with an elevated prime time production presence. This occurs more frequently in the private channels than in the public ones, which tend to act as important producers.

Although the majority of the public channels produce most of the programmes they broadcast during prime time. The elevated

proportion of independent production characterises some public channels. Along with VTM and TV2, the Austrian ORF 2, Germany's ARD, and TVE 1 in Spain display proportions above 30%. These three countries, Austria, Germany and Spain show, elevated levels of independent production in both the public and private channels. In Spain the number of production companies has risen from 57 in 1997 to 151 in 2002. There has also been a significant growth in the number of programmes produced, as can be seen in Table 4.

Table 4.

*Number of independent producers and programmes produced
Spain (1997-2002)*

	Independent producers	Number of programmes
1997	57	113
1998	78	163
1999	105	214
2000	97	181
2001	138	246
2002	151	271

Source: GECA, various years.

The Portuguese Communication Observatory (Obercom) points out that although audiovisual production may still not be elevated, Portugal has never produced as much as it produced in the last few years. Due to growing audience competition, network operators bet more than ever on Portuguese productions for success. The following table shows the airtime and percentages of programming on Portuguese television channels in 2003 according to their country of origin. Although the percentage of American programmes is high (20.56%), the proportion of programmes produced in Portugal is twice as large (56.31). Although Portugal has belonged to the EU since 1986, its cultural ties with Brazil are very strong and the interchange of programmes with that country is as large as Brazil's interchange with the rest of Europe combined. This demonstrates that historical tradition and cultural relations escape from political aims.

Table 5.

Country of origin of Portuguese programming (2003)

Country	N. Hours	Percentage
Portugal	24.439	56.31%
United States	8.925	20.56%
Brazil	1.555	3.58%
Other EU	1.554	3.58%
Japan	1.427	3.29%
Canada	180	0.41%
México	6	0.01%
Other countries	1.555	12.24%
Total	43.400	100

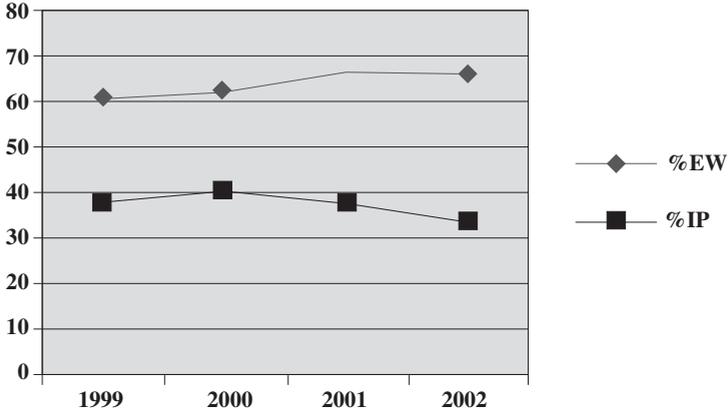
Source: <http://www.obercom.pt/2004/obercom.pt>

More than ten years after the *Television Without Frontiers* Directive, the panorama concerning production could be described as follows. The main public and private broadcasters have increased their own levels of production. In fact, public television channels produce most of the programmes broadcast at prime time.

As a final conclusion, it is worth noting that although the tendency to contract independent productions has diminished (Graph 2); all the channels with the top audiences surpass the 10% required by the EC directive. The majority of these surpass it by a wide margin, although some countries like France, Italy, Portugal, Greece and Ireland are still close to the quota. The first two are due to the experience accumulated by the leading channels in programme production, and the rest are due to the still slow development of audiovisual production.

Graph 2.

Averages of European production and independent production in EU member states (1999-2002)



Source: COM 2004.

“The 2004 Communication from the European Commission on the implementation of the quota system of the TWF Directive has once again confirmed that the proportion of European productions by public service channels is consistently higher than that of private channels” (EBU-UER, 2004: 17). Although the contribution of public channels to European production is greater than that of private channels, this does not signify that their contribution to independent production is greater. At the same time, knowing the investment that is directed toward the independent producers in prime time demonstrates the value that they ascribe to these works. According to the European Audiovisual Observatory (2001), in the United Kingdom 83.5% of investment was directed to prime time programmes; in Italy, 80.5%; in France, 73.5%; in Germany, 68.0%, and in Spain, 64.5%.

3.3. Ownership of European producers and television channels

When it comes to choosing the major producers the diversity of criteria makes it difficult to compile all the data. The *Eurofiction* reports

highlight the major fiction producers. Other criteria that aid the selection of the production companies are the number of programmes they produce each year, their revenue, or only looking at independent producers. In our case we have preferred to respect the criteria used by the experts while taking into account our desire to identify those producers whose programmes garner the major percentage of the audience. At the same time, to see who really maintains control of ideas, it also interests us to know who the owners of production companies and the television channels are, and especially if there exist any links with communications groups.

Annex II collects information from experts on who make up the five top programme producers in each country during the period of study from 2000 to 2003. The source for the ownership of private channels comes from TBI (2003; 2004). Knowing the major producers helps in understanding who actually enjoys significant production power, since the limited scope of our selected sample can, in some cases, cause erroneous highlighting of less important producers or of those who by chance are present in the weeks selected for study.

The major producers of Austria are MR TV-Film Produktionsgesellschaft m.b.H. & Co KG; Intersport Filmgesellschaft m.b.H.; Satel Fernseh-u.Filmproduktionsgesellschaft m.b.H.; Dor Film-Produktionsgesellschaft m.b.H.; Epo-Film Wien / Graz Produktionsgesellschaft m.b.H. Among them, the most important audiovisual actor is Bertelsmann's RTL. The information source for Austria's case is Fachverband der Audiovisions- und Filmindustrie Österreichs Wirtschaftskammer Österreich. Capital owners and capital shares are not available.

In Belgium the principal producers are Woestijnvis, Studio 100, TV De Wereld, Kanakna and Televisiefabriek, although at least during the selected week they are not the ones who produce prime time programming. The private channel's providers, along with Televisiefabriek, as we'll see coming up, are Studio's Amusement, D&D Productions, RV Productions and Endemol. The owners of VTM are De Persgroep (50%) and Roularta (50%).

In Denmark the principal producers are Nordisk Film and TV, Metronome Productions A/S, Scandinavisk Film Kompagni A/S, STV

Television and Nordic Entertainment. The only companies that produced prime time programming during the weeks under study were Metronome Productions and Nordisk Film. The former has specialised in the purchase and subsequent adaptation of entertainment platforms like *Who wants to be a millionaire?* or *Popstars*, and the latter is the producer of the series *Forsvar*. Modern Times Group owns the private channel, TV3.

The major Finnish producers are Broadcasters Oy, CreaVideo, Fremantle Entertainment Oy, Metronome Film & Television Oy, Nordisk Film & TV Oy, Filmitoollisuus Fine Oy, Production House Oy Finland and Jarowsky. In 2004 MTV Produktion AB (Publ) acquired all shares in Jarowskij. Both companies are among the top rated within the Nordic region's television production community and both have plans for further territorial expansions. Jarowsky enjoys a strong position in Sweden and Finland, whereas MTV Mastiff International is market leader in Norway and Denmark. Alma Media Oy is the owner of the private channel MTV as well as national commercial radio channel, local radio stations, two national newspapers and several regional or local dailies. According to Hujanen (2002: 192), "MTV was traditionally owned by established companies of industry and commerce, representing advertisers and film companies and advertising agencies, representing producers of advertisements. The structure of ownership has remained stable from the late 1950s onwards". Fremantle is the largest independent producer in Finland and produces more than 250 hours of programming yearly. The other leading external producers Metronome and Nordisk Film also produce programmes in Denmark.

The French consultant provided the following list of producers: France 2, Réservoir Prod, Quai Sud, GMT Production and Endémol Production. Moreover, Bottéon and du Jaunet (2003) published a report on fiction production in France. In that, various production companies were highlighted for the volume of television hours they produced GMT y DEMD of the Lagardère Active group, JLA Hamster, Son et Lumiere and Telfrance of Michel Canello and family. Five production companies fall under the umbrella of TF1, which was privatised in 1987. Two of them, TF1 Films Production and TF1

International specialise in film production. The current owners of TF1 are Boygues (39%), Société Générale (6%), Groupe Warms and CIE (1.5%), Crédit Lyonnais (0.3%), employees (1.9%) and public (51.3%). Glem specialises in entertainment and reality shows, Les Studios 107 is a technical services company, and TAP (Tout Audiovisuel Production) was created in 2001 with the objective of producing news magazine shows and documentaries.

In Germany the major production companies are Bavaria Film GmbH, 70% of which is owned by the public channel ARD; Studio Hamburg Produktion für Film & Fernsehen GmbH, which also belongs to ARD (75%); Ufa Film&TV Produktion of the RTL-Group (CLT); Ndf GmbH of the Kirch-Group (90%); Endemol Entertainment Produktions GmbH, and Entertainment Service GmbH. A high level of vertical and horizontal integration in the main industry players defines the German market. The main players in 2001 were the CLT-UFA S.A. group and the Kirch group. CLT-UFA S.A. is a Luxembourgian joint-stock company. Bertelsmann AG, the world's fourth biggest media company in terms of turnover, owns a stake in CLT-UFA through the holding company BW-TV Holding. Both have interests in television, radio, film and television production, licensing rights trade, books, newspapers, music and Internet services. The next table shows Bertelsmann's interests in the audiovisual market.

Table 6.

Bertelsmann audiovisual ownership

Germany		International	
PRODUCTION (CLT-Ufa)	BROADCASTING	PRODUCTION	BROADCASTING
UFA Film & TV Produktion Treibtsch Group	RTL TV Group (89%) RTL 2 (34.8%) RTL Disney (50%) Vox (99.7%)	Fremantle in Finland, UK (Thames TV), Sweden, Greece	31 television channels and 30 radio stations in ten European countries, v.g. Antena 3 (Spain)

Source: TBI (2004).

FremantleMedia was previously known as Pearson Television, until the company changed its name in October 2001. Pearson Television was formerly a subsidiary of international media group Pearson plc. In 1993 Pearson plc bought Thames Television, the leading UK production company behind such long-running series as *The Bill* (ITV1), *This Is Your Life* (BBC1) and *Wish You Were Here...?* (ITV1).

Pearson Television was founded after the 1995 acquisition of Grundy, the Australia-based producer of daily serial dramas such as *Neighbours*, and many successful game shows around the world. Grundy had production capabilities across five continents. In each country in which it operated, Grundy acted as a local producer, employing local production staff and producing in the local language as part of the local culture. Pearson Television acquired All American Television in 1997. All American was also an international company, owning many classic formats like *The Price Is Right* and *Family Feud*.

The renaming of the company as FremantleMedia came as a result of Pearson Television's merger with CLT-UFA to form the RTL Group in July 2000, following which it was no longer a subsidiary of Pearson plc. FremantleMedia is 100% owned by RTL Group. In December 2001, Pearson plc sold its 22 percent stake in RTL Group to Bertelsmann.

The merger also bought CLT-UFA's programme making companies into the FremantleMedia stable including UFA Film and TV Produktion and Trebitsch Produktion – two of the market leaders in the German television production sector.

FremantleMedia is one of the largest creators and producers of programmes brands in the world, with leading prime time drama, serial, entertainment and reality shows in around forty territories, including the UK, the US, Germany, Australia, France, Italy, Spain, Portugal, Scandinavia, Latin America and Asia. An average audience

of over 25 million viewers tunes in to view their programmes. It has production offices in over twenty countries. In France Grundy Productions was launched in 1988; in Finland, FMP Finland was launched in 1998; Fremantle Hellas has been a leading producer in Greece; in 1998, four years after opening for business, Grundy Productions Italy SpA established itself as market leader with the acquisition of Mastrofilm; Fremantle Productions Spain (Producciones Fremantle SA) has entertained television audiences in Spain since 1998 Fremantle Productions Portugal (Fremantle Produções de Televisão SA) launched its business in 2000; and in 2003 Fremantle bought Talkback and Thames, two of the best-known brands in television production in the United Kingdom, and founded TalkbackTHAMES that produces 850 hours of programming across all broadcaster. Furthermore, Fremantle is present in Asia, Latin America, Middle East, North and South Africa, Turkey, North America and Australia.

The Kirch Group, prior to its bankruptcy in 2002, owned or participated in television channels such as Premiere, Sat 1, Pro Sieben, Kabel 1, N24, DSF, K-toon,/junior, Classica, Discovery Channel and Goldstar TV. It first began as a distributor of American films in Germany, later on expanding to the production of film and television content and then to broadcasting. Through its three subsidiaries, Kirch Media, Kirch Pay TV and Kirch Beteiligung, it was involved in licensing rights trading, especially sports, commercial broadcasting, pay television, programme production and film-processing services.

Kirch used to play a substantial role in the production and transmission of content in the European television industry. It pursued an aggressive expansion strategy, purchasing shares in foreign companies such as Tele 5 in Spain and Mediaset in Italy. But in 2002, its debt had reached US\$5.5 billion, prompting a credit crisis and subsequent bankruptcy. Some of its holding were sold off, and in 2003 the Saban Group took over many of the remaining assets of the Kirch Group.

The situation of the German production market is determined to a great extent by the situation in the broadcasting market. Almost all of Germany's main production companies have been suffering from declining profits. Apart from eroding margins, another severe problem for independent producers is the growing importance of in-house production departments, which are vertically integrated by the broadcasters in order to cut costs on their supply side (Kleidt; Mehler-Bicher, 2002).

In Greece, in addition to Kino, Anosi, On Productions, STEFI V. Katsoufis – V. Pietra and Studio ATA of Lamprakis Press S.A. (95%) and D. Kouredis (5%), it is worth highlighting the producers Ena Productions and Epsilon for their noteworthy presence in the prime time line-ups of both the public and private channels. The owners of the private channel Antenna TV are Holnest Investments (25%), Sotirios Papadopoulos (25%), Socrates Eliades (25%), George Xanthopoulos (24%) y Efstathius Gourdomdralis (1%).

In Ireland, Radio Teilifís Éireann (RTE) is the state broadcaster and has been operating since 1926. Its television service began operation in 1961 following the passage of the 1960 Broadcasting Act. In addition to being a public service broadcaster, RTE is also by far the largest producer of television in the country, albeit the vast bulk of its production is intended for broadcast on RTE itself. The private channel TV3 belongs to the British Granada group and to the Canadian Media group Can West.

With regard to independently owned production companies, while it is difficult to be definitive, Tyrone Productions is probably the largest independent production company. Founded in 1986 and currently employing 38 people, the company makes the bulk of its programming for RTE and to a lesser extent for TG4, the state-owned Irish language broadcaster. The company is based in Ireland and is 100% owned by four Irish directors. Tyrone is responsible for a wide variety of productions, ranging from chat shows, game shows (the company produces the Irish version of *Who Wants to be a Millionaire?*), DIY shows and also produces the only independently produced soap opera in Ireland, the Irish-language *Ros na Run*. In passing it should be noted

that Tyrone Productions is part of the Abhann Management Group, which also includes Abhann Productions, founded in 1995 to produce the Riverdance tour. The Group also includes River Films, a feature film company and River Productions, a stage production company.

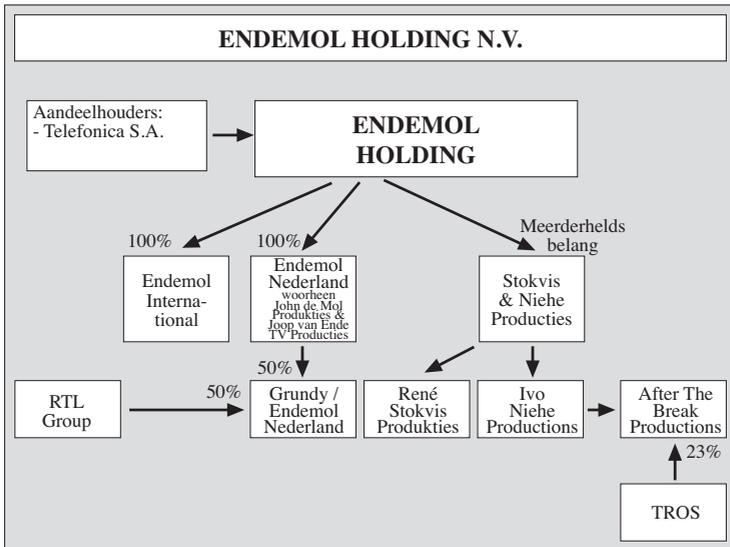
The top fiction production companies in Italy are Lux Vide, Publispei, De Angelis, Solaris, Palomar, Titanus, and Sergio Silva Fiction. Eagle Pictures, Aran Endemol, Film Master, Fascino, Media Film International and Einstein Multimedia also tend to produce prime time programming, although their works do not appear during the days under study. Finally, among the top independent producers ranked by the Dipartimento Vigilanza e Controllo, of the Ufficio Operatori e Contenuti dell'Audiovisivo in Italy, Residori Generation, Demalab, Arte Video, Filmaster and Betanews have stood out over the last few years. The Italian market is highly concentrated. In 1996 the Italian film producer, distributor and exhibitor Cecchi Gori acquired two national licences. Canale 5 belong in 2004 to Fininvest (48.3%) of Mediaset, Canal Plus France (1.2%), Kirch (1.3%), Puttnam Investments (2.2%) and others (TBI, 2004: 81).

In the Netherlands, information on the market shares of television producers is not available. What is clear is that Endemol and Chrysalis IDTV are, and have been for some time, the number one and number two producers (Verdel, 1999). If we look at the independent producers' sales to public broadcasting organisations (in hours of production), we find in addition to these two players a number of relatively small companies. However, the small companies sold between 40 and 70 hours of programming to the public broadcasters in 2002, which is nothing compared to the 1125 hours and 463 hours that Endemol and IDTV sold (Commissariaat, 2002). So the two major players are Endemol Holding and Chrysalis IDTV. Endemol Holding is owned by Telefonica. Endemol Netherlands is a 100% subsidiary of Endemol Holding. In addition, Endemol Holding has a majority share in Stokvis & Niehe Productions, which owns René Stokvis Productions and Ivo Niehe Productions. Chrysalis IDTV is owned by Chrysalis, and it in turn owns a range of production companies, including IdtV Producties. Thus the production market in Netherlands is very much concentrated.

RTL 4 belongs to Holland Media Group and RTL owns Channel 5 in the UK (65%).

The following table reflects the concentration of production surrounding Endemol Holding in Holland.

Table 7.
Endemol Holding in Netherlands



Source: Commissariaat voor de Media (2002).

In Portugal the association of independent producers APIT (Associação de Produtores Independentes de Televisão), which accounts for twenty of the country's forty television production companies, has existed since 1996. Fremantle, Mandala, Endemol, D&D and Valentim of Carvalho form part of its management. While there is a list of member companies, there's no information available about company rankings by business volume or any other indicator. The expert also identified other companies like Clap, Produção de Filmes, Lda, and Pearson, Produções de Televisão, S.A., subsidiary of its British counterpart. The private television company belongs to Soin Com SGPS and Globovision.

The principal Spanish producers are Endemol, owned by Telefonica, and Gestmusic that became to belong to Endemol in 2000; Vocento's Globomedia and Europroducciones, Telefonica's Zeppelin, and Videomedia. As can be seen, the Spanish production market is also very concentrated. The owners of the top television production companies are Telefonica, owner of Antena 3 from 1997 to 2000, and Vocento, owner of Tele 5 since 1996, of the TDT, Onda Seis and Net TV franchises, and of over 30 local television networks spread throughout all of Spain. Telefonica at the same time is the owner of Lola Films, Mediapark and Movierecord through Antena 3 TV, and Vocento controls the producer companies Zeppelin and Europroducciones (Bustamante, 2002: 263; Medina, 2005: 57). The other leading partner of Tele 5 is Mediaset, which controls 52%.

The following tables show the programmes produced by Globomedia and Gestmusic Endemol during the 2000-2001 season for all Spanish channels, including the autonomous community channels. This data underlines their power of influence because their presence in prime time. Some days they compete with their own programmes in different channels.

Table 8.

Programmes produced by Globomedia (2000 – 2001)

Channel	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
Antena 3		<i>Un paso adelante</i>		<i>Policías</i>			
Tele 5	<i>El Informal</i>	<i>El Informal</i>	<i>El Informal</i>	<i>El Informal</i>	<i>El Informal</i>	<i>El Informal (Resumen) CQC</i>	<i>El Informal (Resumen) Javier ya no vive solo La noche de Fuentes</i>
ETB	<i>Date el bote</i>	<i>Date el bote</i>	<i>Date el bote</i>	<i>Date el bote</i>	<i>Date el bote</i>		

Source: Lianes, L. M. *Emprendedores*, 2002.

Table 9.

Programmes produced by Gestmusic Endemol (Spain 2000 – 2001)

Channel	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
TVE 1	<i>Operación Triunfo</i>						<i>Operación Triunfo (Avance)</i>
La 2	<i>Operación Triunfo (Resumen)</i>						
Antena 3						<i>Lluvia de estrellas</i>	
Tele 5	<i>Crónicas marcianas</i>	<i>Crónicas marcianas</i>					
Canal 9	<i>Video y medio</i>	<i>Video y medio</i>					
TVG	<i>Tardes con Ana</i>						

Source: Lianes, L. M. *Emprendedores*, 2002.

In Sweden the principal source we consulted is *MedieSverige 2004*, and the production companies it identifies are Stenbecksfären's MTG; Metronome of Schibsted (65%) and Endemol (35%); MTV Produktion of Sjaätte AP-fonden (15%); Prisma Outside Broadcasting of Ulf Ahnstedet (35%) and Hans Öberg (35%), Roger Holtback (25%) and Jarowskij Enterprises of Amplico (56%). Metronome, as noted earlier, also operates in Denmark and Finland, and Jarowsky operates in Finland. There is another producer, Strix that belongs to Modern Times Group that is also the owner of TV3 in Denmark. The private channel TV4 belongs to Alma Media of Finland (23.4%), Bonnier (21.7%), MTG (15%) and Chase Manhattan Bank (8.1%). Hence, MTG and TV4 are vertically integrated.

In the United Kingdom the major production companies are Granada, a quoted company –no single owner has more than five percent–, Carlton, Endemol's Bazal, the privately owned Lion, Celador of Complete Communication Co. and Fremantle's Thames TV. The concentration of production is high. Granada controls seven regional

television licenses, produces many programmes for independent television and is the owner of the Irish channel TV3 and the Australian Seven Network-The Comedy Channel. On top of that, in October 2003 it merged with Carlton, the owner of five television licenses, and an important international production company.

The production presence of some companies is clear. Their power of influence is greater than that of the television companies, since their programmes garner large audience shares in the countries where they are broadcast. These production companies ally themselves with local partners to adapt the formats of their entertainment programmes to different national cultures. Fremantle belongs to RTL of the Bertelsmann empire, and is, in its own right, the owner of the English producer Thames TV. Endemol is part of telecom giant Telefonica, which owned Spain's third largest national channel, Antena 3, until 2000, and since then has invested in the Spanish digital satellite television company Digital + in Spain and it has got companies in the United Kingdom (Bazal), Spain (Gestmusic), France, Germany, Italy (Aran), Portugal, Sweden (Metronome) and the Netherlands.

The growth of some of these companies has not been based solely on the acquisition of subsidiaries and alliances in other countries; it is also a result of the distribution of their programmes to other countries. Coming up, table 10 shows the programmes of Endemol and Fremantle that aired in other countries during the selected weeks. Again, it is worth underlining the amount of concentration and power of influence beyond national borders seen in this case. We are witnessing the phenomenon of European production companies.

Table 10.

*International distribution of programmes from Endemol
and Fremantle (4th week September 2000; 2003)*

PRODUCER	COUNTRY	LOCAL PRODUCER	PROGRAMMES	TV CHANNEL
ENDEMOL	Belgium	n.a.	<i>Wie Wordt Multimiljonair</i> <i>De surprise show</i>	VTM VTM
	Austria Germany	n.a.	<i>Big Brother</i> <i>Deutschland sucht den Superstar</i> <i>Wer wird Millionär?</i>	RTL4 RTL4 RTL4
	Denmark	Metronome	<i>Hvem vil vaere millionaire?</i>	TV2
	Italy	Aran	<i>Grande Fratello</i> <i>Chi vuol essere miliardario?</i>	Canale 5 Canale 5
	Portugal	Endemol	<i>Big Brother</i>	SIC
	Spain	Gestmusic Zeppelin	<i>Tu Gran Día</i> <i>Eurojunior</i> <i>Pequeños grandes genios</i> <i>Supervivientes</i> <i>Gran Hermano</i>	TVE 1 TVE 1 TVE 1 Tele 5 Tele 5
	U. Kingdom	Endemol Bazal Celador	<i>Ground Force America</i> <i>Changing rooms</i> <i>Who wants to be a millionaire?</i>	BBC ITV ITV
	Netherlands	Endemol Grundy Joop Van der Ende	Het Gouden TeleVisier-Gala TV Makelaar Goede tijden, slechte tijden Adré van Duin op zijn best	Nederland 2 RTL4 RTL4 RTL4
	FREMAN- TLE	Portugal	Fremantle Media	O Preço Certo Em Euros Idolos
Denmark		Metronome	Pop Stars Rivals	TV2
Finland		Fremantle	Idols	MTV3
U. Kingdom		CARlton	The Bill	ITV
Spain		Videomedia	Pop Stars	Tele 5

Source: national consultants.

It is curious that, at least in the sample studied, the producers of the public channels and the producers of the private channels do not coincide. Only the two large production companies, Fremantle and Endemol, produce for different countries and both public and private

channels. Both the Portuguese public channel (RTP) and the Finnish private channel (MTV3) aired Fremantle's programme *Idols*. The public channels of the UK and of Portugal, and the Dutch private channel RTL4 aired Endemol programmes like *Ground Force America* (BBC), the reality show *Big Brother IV* (SIC), the soap opera *Goede tijden, slechte tijden*, the game show *TV makelaar* and the comedia *Adré van Duin op zijn best* (RTL 4). At the same time, the public channel BBC also distributes its programmes to the public channels of Ireland and Holland. Undoubtedly we find ourselves faced with production companies with strong horizontal concentration. Endemol has companies in Germany, France, Italy, Spain, Portugal, Sweden, the United Kingdom, and of course in Holland. In some countries they are associated with other production companies, for example, in Portugal with Prod. Televisivas; in the UK with Bazal; in Spain, Gestmusic, and in Italy with Aran. Its programmes earn prime time audiences in different European countries.

It is surprising that some public channels buy these entertainment programme formats, since their public service mission would seem to oblige them to offer other types of programmes. It is true that the BBC airs a gardening programme and the Dutch public channel Nederland 2 airs a concert, both produced by Endemol.

Finally, the conclusions of this section cause us to reflect on the relations between networks and production companies, the advantages and inconveniences of vertical integration, and on some proposals for ways to guarantee the independence and business strength of production companies.

3.4. Independent producers and vertical integration

Programming can be produced by broadcasters, that is to say in-house production; commissioning to independent producers, so through externalisation the production; acquiring them from international distributors, and finally, through their own producers that are vertically integrated with the broadcasters. According to Hujanen (2002: 97), "the practice of externalisation has been seen both by politicians and the company itself as a measure to increase the cost effectiveness and flexibility of production".

Within the different accords between producers and networks various types of relationships exist (Cuevas, 1994; Medina, 1997): a) *Delegated or commissioned production*, when a network commissions a production company with a programme after having seen the script. In this case the producer takes responsibility for the production; b) *Associated or co-financed production*, in which both parties share personnel and equipment and costs are split. The content rights are divided according to whatever agreement both sides reach, and c) *Co-production* suggests an agreement between various companies in different companies. Television companies tend to be involved in order to guarantee broadcast.

It is helpful to distinguish between production rights, like rights for reproduction, distribution, public communication, transformation, dubbing or subtitling, and ancillary rights derived from sub-products related to the audiovisual work such as merchandising, literary editions, multimedia exploitation or sound tracks. All of these rights can be ceded to third parties for whatever method of exploitation.

The relations between production companies and networks are based on a series of formal or informal contracts which centre around three sets of responsibilities: artistic responsibilities, which decide who generates scripts and who contracts personnel; financial responsibilities, which set out who assumes costs and rights ownership; and technical responsibilities, that are agreements over technical equipment (Pardo, 2001).

The lack of a solid business structure forces production companies to cede all their rights to the television companies, even though the producers themselves understand the power that the networks acquire by retaining control of the images and all of production (Alvarez Monzoncillo; Lopez Villanueva, 1999). They assume the risk and are allowed to exploit the rights in other distribution windows and in other countries, tapping additional revenue streams that will grow in the coming years thanks to the development of local and thematic channels distributed by digital platforms, cable, TDT, the Internet or mobile telephones.

As we have pointed out, in most countries vertical integration process has taken place between producers and broadcasters. Nevertheless, this process of integration does not necessarily begin with production

activity. According to the European Commission, vertical media concentration can be defined as ownership and capital integration among television broadcasters and their associated production and distribution markets. In the United States the need for the networks to provide themselves with content and for the big studios to find outlets for their products have brought about numerous vertical integration mergers. Thus, despite the legal recommendations, the market has developed in a different manner and vertical integration alliances between television channels and production companies are being produced.

In Spain, Sogecable relied on Canal Plus to serve as a starting point to integrate, within its corporate group, the activities of cinematographic production, distribution and exhibition. In this case the authorship rights of audiovisual works combine with the distribution and exhibition rights for said works, developing a complete process of vertical integration of cinematographic products. As an example nothing more is necessary than to simply point out that of Sogetel/Sogecine's 58 theatrical releases from 1991 to 2000, 53 also premiered on Canal Plus (Herrero, 2003).

Germany's Bertelsmann is the owner of the television consortium RTL, which broadcasts in the Netherlands, Germany, Austria and Luxembourg, and of the international production company Fremantle, along with owning shares of Antena 3 in Spain. The British Pearson was bought by CLT-Ufa in 2000. In the same way, the Spanish Telefonica was owner at the same time of Antena 3 TV and Endemol. In the United Kingdom we observed how the important producers Carlton and Granada have merged and are both owners of regional broadcasters. The Nordic Modern Times Group owns the television channel TV3 in Denmark and the Swedish producer Strix, and Alma Media is the owner of TV4 in Sweden and MTV in Finland.

This process of integration has its advantages and also its inconveniences from an economic and strategic point of view. For Porter (1996: 142), vertical integration forms part of provider's competitive business strategy. Mc Quail and Siune (2004: 57-58) summarise the advantages of all types of vertical integration in the following words: "an important element of the modern economy, generating new and interesting jobs, better education, learning on the job facilities, greater job security and

higher wages. By enterprises look overwhelmingly positive: power, influence and prestige increase, predominant market position can be achieved, new innovative possibilities are created, synergies (...), risks are dispersed, economies of scale and scope raise efficiently, profitability increases and with regard international competition, their own competitiveness is ensured” (Mc Quail; Siune, 2004: 57-58).

Other advantages of integration for production companies and television channels are financial security and a better adaptation to the programming preferences of the broadcasting channel (Papathanassopoulos, 2002: 106). Doyle (2002: 73) even argues “that the cost-savings they create make it possible for local and regional audiences to have more expensive and better programmes”. Furthermore “a bigger production slate creates a brand image and reputation which can be exploited in domestic secondary and international programme markets and it also creates economies within the marketing and selling functions”. According to Arthur Andersen (1998: 18), “vertical integration can affect programme expenditure in two main ways. Firstly, it can avoid the possibility of double mark-up that could increase the price of programming; secondly it can lower the costs of programming by sharing risks between programme maker and broadcaster”.

Mc Quail and Siune (2004) also signal the dangers that concentration brings with it. “For the individual recipient, concentration processes reduce the diversity of information since pluralism becomes potentially limited by an increase in distribution channels under the control of very few owners or by barriers limiting access to the media. The public interest is affected by diagonal and horizontal concentrations as overriding interests of profit generation for shareholders strictly limit the genuine social responsibility of the media” (Mc Quail; Siune, 2004: 57). Among the inconveniences for production companies are the loss of editorial and commercial control and therefore, their loss the copyright to distribute the programmes in other windows. Also, if the relationship with the broadcasting channel is exclusive, the production company loses potential buyers.

Nevertheless, despite these ownership ties, the relationships between production companies and networks tend to be more favourable for the latter: if programmes earn below average audience shares they reserve

the right to rescind their contract with the production company (López, 2002). The producers then have to release the employees contracted for the programme and assume the general costs that can not be attributed to the production of the episodes themselves. The success of programmes depends on many factors, among other, on their promotion, programming, and on the competition's programming. Production companies can not control these factors, which are dependent on the networks. This tends to cause the production companies to inflate their budgets above costs in order to assure themselves an industrial margin.

At the same time, the independence of producers also has costs. The big production companies frequently find themselves competing with each other with programmes broadcast at the same time on different channels (see Tables 8 and 9). On top of that, when they give exploitation rights to televisions that then assume all distribution costs the production companies lose the possibility of growing their business and forming a solid and competitive infrastructure.

This process of vertical integration will not affect small producers and will not really affect the relation between producers and theme channels. Digital platforms and cable operators may see themselves involved in the process (Medina; Herrero, 2005). This underlines that the big companies, either through the production or through distribution of content are those that will develop growth strategies. The rest tend to be small, with reduced payrolls and minimal fixed costs. Although the regulations seek to favour producer independence and avoid the concentration of power, professionals consider vertical integration necessary in order to deal with the uncertainty of the sector (Bardají; Gómez, 2004). Concentration, in fact, is not the consequence of ownership relationships but rather of the oligopoly which run the television networks. These buy their programmes from ten production companies that produce over 50% of broadcast time. Thus, although the sector has grown, its atomisation has been accentuated: only ten companies are strong and only a handful of genres and types of programmes have a place (Pardo, 2001).

Other ways of guaranteeing producer independence exist, however. One of these ways, considered in the legal frameworks of some countries like Belgium and Italy, is the possibility of negotiating with any broadcaster.

In fact, in spite of ownership ties, some production companies have been able to negotiate with competitor channels and sell their programmes to any channel they choose. Table 11 shows the different channels that have aired programmes produced by companies incorporated in communications groups in Spain. In every case situation arise where successful programmes are broadcast by a competitor channel. At the same time, the disassociation between production and broadcast within the same company is a sign of the lack of strategic direction in some groups.

Table 11.

Broadcasters and programmes produced by integrated production companies. Spain (2000 – 2003)

Programmes	Broadcaster	Producer (capital share)	Owner producer
<i>Al salir de clase</i> <i>El comisario</i> <i>Pasapalabra</i>	Tele 5 Tele 5 Antena 3	Boca Boca (30%)	Vocento (T5)
<i>Javier ya no vive solo</i> <i>7 Vidas</i> <i>Periodistas</i> <i>La Noche con Fuentes y cia.</i> <i>CQC</i> <i>El Informal</i> <i>Supervivientes</i> <i>Un paso adelante</i> <i>Compañeros</i> <i>Policías</i>	Tele 5 Tele 5 Tele 5 Tele 5 Tele 5 Tele 5 Tele 5 Antena 3 Antena 3 Antena 3	Globomedia (88%)	Grupo Arbol (Vocento - T5)
<i>Lluvia de estrellas</i> <i>Operación Triunfo</i> <i>Crónicas Marcianas</i>	Antena 3 TVE 1 y La 2 Tele 5	Gestmusic- Endemol (100%)	Telefónica (A3TV)
<i>Confianza Ciega</i> <i>Gran Hermano</i> <i>El Juego del Euromillón</i>	Antena 3 Tele 5 Tele 5	Zeppelin TV	Telefónica (A3TV)

Source: Our own elaboration.

The content outlets for the European production sector range from the distribution of programmes in other European and international markets (COM 94), offering consultant services, signing coproduction

agreements with foreign producers, aiming for specialisation and producing for theme channels, mobile telephones and the video game industry and lowering costs through agreements with advertisers through product placement formulas.

Another solution for favouring independent production is encouraging coproductions. In agreement with González (2003), coproductions offer the following advantages: they help diversify risk, they increase the production capacity of companies, they allow a degree of specialisation, they give access to new forms of state aid, they permit larger guarantees, more financial reliability and profit sharing. The production companies in coproductions are titleholders and thus acquire rights and control over production (Baltruschat, 2003).

Producers can tap into an endless stream of public subsidies. With the goal of stimulating commercial film production, the conditions for receiving this aid is reaching a set minimum of box office revenue. In order to gain access to the European Euroimages fund it is necessary to have five percent of the financing guaranteed and to distribute the work to at least three EU countries.

The power of the sector is due in part to the oligopolic nature of the sector; while there are some one hundred producers there are only three to five big buyers. This power forces producers to develop projects of little profundity, with flexible structures that allow one time contracts for workers, low budget work, rapid production start-up and to look for less ridged markets like mobile telephones, the Internet or cable. The Media Plus programme started a system of aid in 2004 (94/2003) to encourage the distribution of European productions through DVD and video.

Greater co-ordination between the work of production companies and the networks would contribute to creating more stable television schedules that would increase audience loyalty and give producers more stability. Each rescinded contract means the firing of employees, lost investments, and personnel worn down from loss of confidence and motivation, which in the long run endangers the creativity and cohesion of production teams. To avoid some of this insecurity several

of the producer associations have begun to promote financial compensation for those productions that surpass a network's average audience share. Although at the moment no system apart from ratings exists to evaluate programmes, this proposal would at least serve to reward creativity (Alvarez Monzoncillo; López Villanueva, 1999).

4. Prime time programming and production

4.1. Producers of public and private channels

With the aim of aiding comprehension, the following four tables offer a review collecting all of the producers of the selected prime time programming from the top public and private channels. When the producer is the same during the first and second hour is only listed once. First the tables from 2000 are laid out, and then following them are the ones for 2003. Any producer incorporated with broadcasters, even if their programmes air in different countries, are not considered independent—specifically, Endemol and all its subsidiaries, Pearson, Granada, Yorkshire, Carlton, Globo (Brazil), Globomedia, BocaBoca and Atlas.

When studying the fourth week of September it is important to take into account that during that week the Sydney Olympic Games were broadcast, and in the top public channels of Finland and Sweden the rebroadcast coincided with some or all of prime time. It is also important to note that no data was found for this year in Germany and Ireland.

If we compare the evolution of producers from 2000 to 2003 we can see that in some cases there is no significant difference, with tendencies initiated in 2000 being generally maintained. In Austria during the period of study it is apparent that both the public and private channels are important producers, and the public channel airs programmes from the German public television network ZDF. In Belgium the public channel continues to carry production from Woestijnvis, and the private channel, along with programmes from Studio's Amusement, aired various formats from Endemol in 2000.

Table 12.

Producers of prime time of public channels (2000)

Cntry	Channel	Monday	Tuesday	Wednesday	Thursday	Friday
AUS	ORF 2	Terranova/ ZDF/ORF	Co-prod./ ORF	ORF	Co-prod. ORF	ZDF ORF
BE	TV1	Woestijnvis VRT	Woestijnvis VRT	Woestijnvis VRT	Woestijnvis VRT	Woestijnvis VRT
DN	TV 2	TV2	TV2 USA	TV2	TV2	TV2
FIN	YLE1	Sydney 2000				
FR	France 2	Alya Studio Expand Sylvian Attal	Arnon Milhan & et al. France 2	Hamster/JLA Réservoir	France 2 David O. Russell	Tel France/Ftvi Son et Lumière& France 2
GER	ARD	n.a.	n.a.	n.a.	n.a.	n.a.
GR	ET1	Studio ATA G.Zerboulakos -Greek Cinema Centre- K.Ferris	Studio ATA Theasi	Sydney 2000 Pantas TV	Sydney 2000 Studi ATA	Sydney 2000
IR	RTÉ	RTE	RTE	RTE	RTE	Earth Horizon BBC
IT	RAI 1	RAI Publstei/RAI	RAI	RAI USA	RAI	Eu co-prod.
NL	Nederland	Rene Stokvis Evangelische	TROS	Sport	Sport	Endemol
POR	RTP 1	Tin Tin&Bevan Não informado	Film	Tin Tin&Bevan	Tin&Bevan USA	n.a.
SP	TVE 1	USA Gona TV	Football	Football	USA	Estarciera Gestmusic- Endemol
SW	SVT1	Sydney 2000	Sydney 2000	SVT	SVT	ITV1
UK	BBC 1	BBC/Endemol	BBC	BBC	BBC	BBC Big Bear F.

Source: national consultants.

Table 13.

Producers of prime time of private channels (2000)

Cntry	Channel	Monday	Tuesday	Wednesday	Thursday	Friday
AUS	RTL 4	Odeon Film/RTL Grundy	RTL	--	RTL	RTL
BE	VTM	Studio's Amusement D&D Prod	Studio's Amusement Endemol	Studio's Amusement Endemol	Studio's Amusement RV Productions	Studio's Amusement Endemol
DN	TV3	Sternin/Fraser &Tristar TV 3	TV3	TV3	TV3	USA
FIN	MTV3	Spede-yhtiöt	USA	MTV3	Broadcasters	Fremantle
FR	TF1	GMT Lauribel	Luc Besson Coyote	Football	GMT Paulo Branco	Glem Quai Sud
GE	RTL 4	n.a.	n.a.	n.a.	n.a.	n.a.
GR	Antenna TV	Epsilon Ena	Ata Theasi	Epsilon Ena	Epsilon Ena	Epsilon Ena
IR	TV3	BBC USA	Soccer	Soccer	USA	USA
IT	Canale 5	Mediaset Eu co-prod.	Mediaset Eu co-prod.	Mediaset Sport	Sport Aran Endemol	Mediaset Aran Endemol
NL	<i>RTL 4</i>	Grundy/ Endemol USA	Grundy/ Endemol Filmfonds Vlaanderen	Grundy/ Endemol Filmfonds Vlaanderen	Grundy/ Endemol Filmfonds Vlaanderen	Grundy/ Endemol USA
POR	SIC	Pearson Globo	Pearson Endemol	Pearson	Globo Pearson	n.a.
SP	<i>Tele5</i>	Globomedia USA	Globomedia	Globomedia	Globomedia Gestmusic- Endemol	Globomedia USA
SW	TV4	Jarowskij USA	Meter USA	Pearson MTV	TV4 USA	TV4
UK	ITV One	Granada Celador	Yorkshire Carlton	Granada Yorkshire	Yorkshire Celador	Granada Carlton

Source: national consultants.

The Danish public channel was the principal producer in 2000 and continued as such in 2003. The same occurred with the private channel although along with airing its own programmes it broadcast an American documentary in 2000. In 2003 the presence of American programming is notably higher. France maintained several producers and incorporated several new ones. In 2000 the presence of independent producers is notable. Reservoir, Son et Lumière, David O. Rusell, Hamster and Tel France in the public channel, and GMT, Quai Sud, Coyote, Lauribel, Glem, Luc Besson and Paulo Franco in the private channel.

In Greece the public channel contracted more independent producers in 2000 than in 2003: Studio Ata, Pantas TV, Theasi, and the film producer G.Zerboulakos-Greek Cinema Centre-K.Feris. The private channel continued working with the same independent producers. In Italy, RAI and Mediaset are producers and broadcasters, and this trend did not abate three years later. Still, co-productions form an important characteristic of this market. In the year 2000 RAI aired the series *Il commissario Rex... e tutto ricomincia* co-produced by Mungo-Film, Sat 1, ORF and Canale 5. *I Misserabili*, was co-produced by DD Productions, Fox Family Channel, GMT Productions, Mediaset, Sat 1, TF1 and Taurus Film.

In Netherlands a tendency contrary to the majority of countries occurs. In the public channel there is more national production in 2000 than in 2003. In 2000 there were productions from Rene Stokvis, Evangelische Omroep, Tros and Endemol. In Spain it is worth underlining the concentration of production in the private channel in 2000. Tele 5 aired programmes from Globomedia, one of its major shareholders, on two different days. Tele 5 has also been the Spanish channel that broadcast the most programmes from Gestmusic Endemol, despite it belonging to the owners of the competing channel. TVE also broadcasts programmes from Gestmusic Endemol, and other independent small producers, such as Estarciera and Gona TV. American programmes are broadcast in both, the public and the private channels during the two years.

Contrary to the general tendency, the Portuguese public channel displays a loss of independent production from 2000 to 2003 (Table 3),

however the presence of producers in prime time in 2000 was minimal. Only the series *Riscos*, from the production company, não informado, was aired. According to Table 3, in contrast, independent production in the private channel rose two points in 2003. This does not seem difficult taking into account that in 2000 it aired a game show (*A Febre do Dinheiro*) from Pearson, a series from Central Globo de Produções and Endemol's *Big Brother IV*.

Despite Table 3 showing that independent production went down in the private Swedish channel, the presence of independent producers in 2000's prime time was scarce. Two American movies were aired along with the Swedish series *Skilda världar* from Pearson TV. In the United Kingdom the BBC maintained its production presence during the period studied, and the proportion of independent production even went down in 2003. ITV only maintained the appearance of independent production, since the principal producers in 2000 were Granada, Yorkshire and Carlton, which are franchise holders for regional television licences. Thus independent production must occur during other parts of the day.

The following tables show the producers for the public and private channels during the years 2002/03.

Table 14.

Producers of prime time of public channels (2002/03)

Cntry	Channel	Monday	Tuesday	Wednesday	Thursday	Friday
AUS	ORF 2	ZDF ORF	Co-prod. ORF	TV Movie	Co-prod.	Eu co-prod. ORF
BE	TV1	Woestijnvis VRT	Woestijnvis VRT	Woestijnvis VRT	Woestijnvis VRT	Woestijnvis VRT
DN	TV 2	TV2 Metronome	TV2 Metronome	Nordisk Film	TV2	Paseo Film
FIN	YLE1	Broadcasters YLE	Oxford Film YLE	YLE Tarinatalo/ YLE	YLE	Broadcasters YLE
FR	France 2	Expandrama, Alia/Rtbf/ France 2	USA	Réservoir Prod	France 2 Equipage TV5/RFO	France 2 Son et Lumière
GER	ARD	ARD/Monaco ARD	N df GmbH Saxonia Media	Football	ARD	ARD
GR	ET1	Basket	Koutsojmitis Profit	Football	Profit	Profit USA
IR	RTE	BBC RTE	RTE Earth Horizon	RTE	RTE BBC	BBC RTE
IT	RAI 1	RAI RAI & Sacha	RAI	RAI	RAI	RAI RAI&Clemi
NL	Nederland	BBC/BNN	CBS/ZDF	USA	Sky High	Ivo Niche
POR	RTP 1	D&D Fremantle	Fremantle RTP Cinema	D&D	D&D Fremantle	D&D Fremantle
SP	TVE 1	Gestmusic- Endemol	USA	USA	Cartel and Ganga	Gestmusic- Endemol
SW	SVT1	SVT	SVT	SVT Bel Air (fr.)	Kerberos Fireworks	SVT Co-prod NRK
UK	BBC 1	BBC Endemol	BBC	BBC	BBC	BBC Big Bear Films

Source: national consultants.

Table 15.

Producers of prime time of private channels (2002/03)

Country	Channel	Monday	Tuesday	Wednesday	Thursday	Friday
AUS	RTL 4	RTL	RTL	RTL	RTL	RTL
BE	VTM	Studio's Amusement RV Prod	Studio's Amusement De Televisiefabriek	Studio's Amusement De Televisiefabriek	Studio's Amusement VTM	Studio's Amusement De Televisiefabriek
DN	TV 3	USA	USA	USA	USA	USA
FIN	MTV3	Spede-tuotanto	USA	MTV3	Broadcasters	Fremantle
FR	TF1	GMT Reservoir	USA Quai Sud	Studio 107 Christopher S.	Lauribel/ Be aware	Quai Sud Isoète Prod.
GE	RTL 4	RTL	USA/RTL	RTL	RTL	RTL
GR	Antenna TV	Ata Ena	Ata Ena	Epsilon Ena	Epsilon Ena	Epsilon Ena
IR	TV3	USA Granada	TV3	USA Orion	USA Shed	Channel 7 DC
IT	Canale 5	Mediaset USA	Mediaset	Mediaset RTI	Mediaset RTI	Mediaset
NL	RTL 4	Grundy Endemol 625 TV	Grundy Endemol	Grundy USA	Grundy Endemol	Grundy Holland Media House
POR	SIC	SP Endemol	Endemol	SP NBP	SP Fremantle	Fremantle NBP
SP	Tele5	Atlas USA	Atlas USA	Atlas Videomedia	Atlas Zeppelin	Atlas USA
SW	TV4	TV4 USA	Meter DR	Nordisk Carlton	Jarowskij USA	MTV Prod. Strix TV
UK	ITV One	Granada	Yorkshire La Plante	Granada Yorkshire	Yorkshire Thames	Granada Yorkshire

Source: national consultants.

The following conclusions can be gathered from analysing the data from the last few years:

In the case of the public channels the majority of content is produced in-house. Nevertheless, there exists a growing independent production presence working to produce or co-produce programmes with the

network. Above all it worth highlighting the contribution to independent production of the public channels of Austria (ORF), Belgium (TV1), Denmark (TV2), Finland (YLE), France (France 2) and Italy (RAI).

The behaviour of the private channels, though, is different from that of the public channels. In general they contract more independent production. This is understandable since they have less production experience than the public channels. There are only three channels that are not simply broadcasters but also control production: RTL4 of Bertelsmann, which broadcasts both in Germany and in Austria and Netherlands, produces the majority of its programmes; Mediaset, owner of Canale 5 produces the majority of its prime time programmes either directly or through its production company RTI, and Granada and Yorkshire, owners of ITV regional licenses, are also important producers of programming for the number three channel in the UK.

The rest of the channels air programmes from independent producers. In Belgium the production companies Studio's Amusement and Televisiefabiek, and in Greece, Ena and Epsilon produce almost every day. France and Sweden are characterised by their reliance on a large number of production companies for their prime time line-ups. In France Reservoir, Quai Sud, GMT, Studio 107, Christopher S., Lauribel-Bé Aware and Isoète Prod. stand out, and in Sweden Meter, DR, Jarowsky, Strix and Nordisk, which also produces in Denmark, are the most notable.

Although it is difficult for independent producers to find space in the prime time line-ups of the leading channels, we can continue to see the importance wielded by some production companies by their capacity of prime time production and by the audience their programmes accumulate that frequently surpass the average share garnered by the network that airs them. If we consider audience share as power of influence, we can say that the capacity of influence wielded by some production companies surpasses even that of the broadcasters. This is the case, for example, with GmbH's series in the German public television network ARD that has an average share of 14% *Adelheid und ihre Mörder* (20,2%), *In aller Freundschaft* (16,4%) and *Die Kommissarin*, coproduced with the television company (22,8%). In the United Kingdom this happens with Yorkshire TV's *Emmerdale* (47%) and *The Bill* (33%) of Thames

production in ITV, whose audience is higher than the average of the channel (22,7%).

For example, in Denmark the production company Metronome produces *Who wants to be a millionaire?*, which earned an audience share of 46.56% in TV2, whose average share is 38%. In France Quaisud's programme *Confession Intime* garnered an audience share of 37.7% for TF1, whose average is 32.7%, and the average audience of France 2 (20.8%) is surpassed by the magazine show *Ca se discute* (37%) from Réservoir Prod. In the public channel in the Netherlands there is only one programme produced by an independent producer that surpasses the average audience of the public channel (17.0%): the talk show *TV Show* (18%) produced by Ivo Nieve of Endemol. Every one of Endemol's programmes on RTL 4 beats the average audience of the television channel. In Spain the series *Cuéntame* from Cartel and Ganga earned a 42.2% share while its broadcaster had an average audience of 24.7, and *Hospital Central*, produced by Videomedia won an audience share of 26.7% while its broadcaster, Tele 5, had an average share of 20.2% in 2003. The producer Jarowsky of the Amplico group in Sweden produced the programme *C/O Segennyhr* and obtained an audience share of 38.8% while the average share of the broadcaster was 25%.

The following table gathers the independent production companies whose audience share surpassed that of the broadcaster and whose programmes are produced entirely by them.

Table 16.

Audience share of series produced by independent producers (2003)

Programme	Producer	Highest share	Channel	Channel Share
<i>Familia</i>	Studio's Amusement	39.9%	VTM	32.0%
<i>Forsvar</i>	Nordisk Film	45.5%	TV2	38.0%
<i>Os Malucos do Riso</i>	SP Filmes	41.8%	SIC	35.3%
<i>Cuéntame cómo pasó</i>	Cartel&Ganga	42.2%	TVE1	24.7%
<i>Hospital Central</i>	Videomedia	26.5%	Tele 5	20.2%
<i>C/O Segemyhr</i>	Jarowskij	38.8%	TV4	25.0%

Source: national consultants.

Magazine shows or exported programme formats where the ideas do not genuinely belong to the producer were not counted. The countries whose independent producers were significantly influential (with their programmes surpassing the broadcaster's average share) were Belgium's Studio's Amusement, Denmark's Nordisk Film, and Spain's Cartel, Ganga and Videomedia. Programmes from integrated production companies also earned high audience shares, but their power of influence did not simply reflect on themselves but also on the broadcasters to whom they are connected.

At the same time we can see how the processes of vertical integration are especially strong in cases like the Endemol group, owner of the production companies René Stokvis Productions, Ivo Niehe Productions and Grundy, along with the channel RTL, which broadcasts in Germany, Austria and Holland, and Granada, owner of seven ITV licenses and various production companies like Thames and Yorkshire.

4.2. General trends in public and private channels

The data in this part of the book comes mainly from the information gathered by the national consultants. The following conclusions are focused on the prime time of the top public television channel and the top private one from the fourth week of September in 2000 and 2003 in most of the cases. The structure will follow country by country chronologically. At the end, the appendices show detailed information.

Identifying the production company behind programmes can be complicated at times, not only because sources of information are not very transparent, but also because only the main players know the real details of agreements about the negotiation and distribution of copyrights of the works (see Annex III).

AUSTRIA

2000

Public television in Austria has its own considerable presence in the production of various programming, with three magazine programmes

Thema, *Der Report* and *Help TV Spezial*, the talk-show *Vera*, and *Lebensretter*. It also broadcasts its co-production *Der Landarzt* with ZDF and Terranova, the German production of ZDF *Siska*, and the documentary programme *Universum*, which airs twice a week. In prime time there is almost no presence of independent producers.

Bertelsmann's private television network broadcasts programmes produced by its own company and the formats of acquired programmes. Among their most popular shows are *Doppelter Einsatz*, *Im Namen des Gesetzes*, *Die Motorrad Cops*, *Nikola*, and two entertainment shows: the reality show *Big Brother* and the quiz show *Quiz Einundzwanzig*. In 2000 it was the private network that bought the rights to Champions League football, although it was not one of the programmes with the greatest number of viewers.

2003

Some programmes that appeared in 2000 stayed on the prime time schedule, such as *Vera*, *Universum*, and the co-production with Germany's ZDF *Siska*. In 2003 the political debate show *Sommorgespräche* was added along with the magazine show *Thelma* and the documentary show *Zurück ins Leben-Hilfe für die Seele*. It is also worth noting as something new the broadcast of the TV movie *Scheidung Mit Hindernissen*.

In 2003 RTL maintained its strategy of broadcasting its own productions. On Tuesdays it continued with its series *In namen des gestzes*. Fridays saw the substitution of the quiz show *Quiz Einundzwanzig* for *Wer Wird Millionär*, while the rest of the weekly scheduling stayed the same as was broadcast in Germany.

Neither Austria's major private network nor its public one dedicated its prime time air slots to independent production. They themselves were the producers of the shows they broadcast during those hours of the day.

BELGIUM

Belgium is by nature a pluralist country. With the aim of respecting strong cultural, social and political identities it has configured a totally divided television market. The present study has taken the Flemish

sector as a reference. The birth of the Flemish nation required the creation and diffusion of a cultural homonym that could differentiate itself from French Belgium and serve as a spark plug for the community. In this sense public television plays a fundamental role (Van den Bulk, 2001).

2000

Television programming does not vary from Monday to Friday. The lone production company in prime time is Woestijnvis. The series *Thuis*, that airs in prime time from Monday to Friday, is produced in-house by the public channel VRT.

In 2000 the private channel contracted three independent producers: Studio's Amusement, D&D Productions and RV Productions; and aired Endemol's quiz shows *Wie wordt multimiljonair* and *De surprise show*.

2003

In 2003 the public channel maintained the same programming and the private channel kept the Studio's Amusement's soap opera in the first hour of prime time. The private channel contracted three docusoaps produced by Televisiefabriek, a comedy for Mondays from RV Productions and a programme of its own production.

DENMARK

2000

TV2 is the producer of almost every programme that it airs in prime time. In Denmark the first hour of prime time is filled with news and it is surprising the size these programmes' audiences. In 2000, with the incorporation of the Euro as the EuroZone's currency, the Danish public channel included various programmes about the European monetary union produced by its own in-house studio.

If prime time programming is compared to the elevated proportion of programmes coming from independent producers in Table 3, in 2000, 98%, and in 2002, 84%, it likely signals that these works are being destined mainly for hours outside of prime time.

The private channel's first hour is filled by an American series. In its second hour it airs a national soap opera, produced or run by the channel itself, *Hvide Løgne*.

2003

With the exceptions of Wednesday and Friday, every day of the week has seen the audience share of the public channel's news programmes rise with respect to 2000, even taking into account that year's greater newsworthiness due to the debates within Danish society over the Euro. In three years the public channel has increased its audience share by two points, thanks to two quiz shows, *Who wants to be a millionaire?* –rating: 9.61%– and to a lesser degree, *Pop Stars Rivals* – rating: 8.98% –. The current programme about fat people and their struggles to loose weight, *Live er Fedt*, is the public channels biggest audience draw during prime time with a 22.04% rating. The crime series *Forsvar*, produced by Nordisk Film, also contributes an important percentage of the channel's audience, with a 17.96% rating.

In contrast to other European countries, in 2003 the private television network's prime time schedule is filled with American productions from CBS and HBO. A possible explanation is the youth and commercial direction of this channel. In fact independent production percentages do not exist for this channel (Table 3). The lack of variation in programming during weekday prime time is striking, even more so if you take into account 2000.

FINLAND

2000 data is incomplete because it was unable to get either rating or share of the programmes, and the public channel broadcast the Olympic Games during the forth week of September.

2003

The majority of the programmes aired by the public channel are produced by themselves or in co-production with Broadcasters Oy. Only one foreign programme was aired, the news show *Prisma Superkärpänen*.

The same could be said of the private: its programmes are produced in-house and by Broadcasters Oy, Ko Mut and Spede-tuotanto. It also

broadcast an in-house current events programme, another Fremantle programme, and an American series.

FRANCE

2000

The French production industry has grown notably in these last years. The public channel is characterised by the development of co-productions with independent producers. On top of that, it has come to be a distribution medium of programmes produced by independent producers. In 2000 during the studied week's prime time schedule five independently produced shows were aired, as well as French and American films.

The private channel also counts on independently produced programmes to fill out its schedule. In 2000 it had two programmes from the production company GMT: the telefilm *Les Misérables* and the series *Julie Lescaut*. Surprisingly the channel does not air any programmes produced by the channel itself. It is also apparent that film is wrapped up in French television. A movie and two telefilms were broadcast during that week's prime time.

2003

As the tables show, the figures of both channels show a strong parallelism. In the first hour of prime time TF1 achieves the highest audience share every day, although the difference is very small. In the second hour both channels fight for the first place. A particular difference from other countries is the presence of magazine shows at prime time every day. There is no day in which people cannot enjoy such programmes either on France 2 or TF1, whereas in other countries films and TV series occupy most of prime time.

It is worthwhile to point out the greater number of production companies that air their programmes in prime time compared to other countries. In TF 1, the broadcaster does not produce most of the programmes, so there is a very significant presence of independent producers in TF1 prime time. They contracted another magazine show from the producer Réservoir Prod and aired another series from GMT

as well as contracting programmes from other producers like Quai Sud, Studio 107, Lauribel / Be aware and Isoète Production. The prime time schedule is composed of fiction shows and magazine show. France 2 is one of the main television producers in France, produces many programmes. However, some of them are co-productions and there are also programmes coming from other producers during prime time. It is interesting to notice that on Tuesday two American films are broadcast and they did not reach a high audience in comparison with the French productions. The strong presence of Canal Plus and Canal Satellite Numerique in the French television market may help make understandable this last feature due to the great investment that these channels have made in domestic cinema.

In 2003 the tendency toward co-producing fiction with independent producers is more accentuated. The French production companies have the television channels like the first window of exploitation of their products, and because of that there are various production companies among the producers of prime time programmes. On top of the five big producers there are other smaller producers. Although there are no shortages of protests in the press about the “Taylorization” of audiovisual production and the invasion of the reality show and quiz show formats produced above all by Endemol and the loss of product quality (Durin-Valois, 2003; Dutheil, 2003).

GERMANY

It was no possible to get audience data from 2000.

2003

German public television as a production company has centred itself in the co-production of the series *Die Kommissarin* with the production company Monaco Film GmbH along with various news magazines like *Report* and *Panorama*, a news documentary show *ARD Exclusiv*, and the TV movie *Tartot*. Tuesday is the day set out for the broadcast of fiction programmes produced by external producers, *Adelheid und ihre Mörder* produced by Ndf Gm bH owned by the Kirch group, and *In aller Freundschaft* of Saxonia Media Filmproduktion. Wednesday, like in other European countries, is a day assigned for football, this

time the Germany-Scotland game garnered a 48.8% share and more than 15 million viewers.

German public television displays an emphasis on news and culture programmes, and (though in lesser proportion) the presence of independent producers (Meier, 2003). There is also a notable absence of foreign programmes. That is due to increasing competition and costs. Thus, ARD as public television is marked by its news-cultural programmes and by the promotion of national fiction works.

The private television network of the Bertelsmann group broadcasts above all entertainment programmes that they have acquired, *Die ultimative Chart Show*, *Deutschland sucht den Superstar* and *Wer wird Millionär?* They also show in-house fiction productions like the series *Im Namen des Gesetzes* and *Mein Leben & ich-Ritas Welt*, and the TV movie *Alarm für Cobra 11*. Finally, it is worth pointing out that it has scheduled in prime time Paramount's American series *Milenium Man*. In contrast with the public television network, entertainment and in-house production define the private television programming more. Save for the American series, it does not air a single external production.

With respect to the public channel, the two slots of prime time show the clear predominance of the channel's own productions house, ARD. Something similar occurs with the top private channel, in which the majority of the productions come from RTL.

Not even affiliated production companies produce most of the programmes on ARD and RTL in-house. This reveals, in the case of the German market, the minimal role that independent production companies play in the time slots with the maximum audience. In fact, in Germany there is not yet a legal definition for independent producer as there is in other European countries. If we were to consider ARD and RTL as production companies, one could talk about the concentration of programme production in these two companies during prime time. The first one achieved a cumulative audience of 30 million viewers just in a week through its programmes, and the second one more than 32 million. The audience coverage of these channels in their own productions is much bigger than their audience television share. So as producers they have a larger power of influence than as broadcasters.

GREECE

2000

The Greek public channel contracted various programmes from various independent production companies such as Studio ATA, Theasi, Pantas TV and G.Zerboulakos-Greek Cinema Centre-K.Ferris. The private channel worked with two production companies: Epsilon and Ena Production.

2002

The public channel in 2002 worked with the production companies G. Koutsomitis, producer of the series *I agapi argise mia mera* (“Love was a day late”), and Profit, who produced the two series *Ta ftera tou erota* (“The wings of love”) and *Ystera irthan oi melisses* (“The bees came later”) for prime time. There has been a decline of production companies in the public channel’s prime time line up from four to two, and one of those companies was responsible for two programmes.

Along with the series *Konstantinou Kai Elenis* by Epsilon that was already airing in 2000, in 2002 the private channel added that company’s *Vodka portokali* as well. The success of the series *Eglimata* from Ena Production explains why it was kept on the air for various seasons (Koukoutsaki, 2003).

IRELAND

2000

Every programme broadcast by the public channel is produced in house, but the programme *About the House* produced by Earth Horizon and the BBC’s British comedy series *As Time Goes By*.

The private channel does not have any programme produced by an independent producer. Most of the programmes are American, or produced by the BBC. Two days there is the Champions League Soccer’s matches.

2003

Only the data from 2003 was available. The public channel only aired one programme from an independent producer, Earth Horizon

Productions. The rest of the programmes came from the BBC and the channel, itself. The channel's production was quite varied: a quiz show, the soap opera *Fair City* and a fashion show.

The private channel broadcast many American-produced programmes, a strange characteristic, since the majority of the channels, both public and private, air programmes produced in their own country. It also has an English programme, *Coronation Street* from Granada TV, a movie from Orion Pictures, and a chat show from DC Productions.

ITALY

The Italian market is peculiar because the high level of ownership concentration in the country's television industry. Mediaset, Berlusconi's company, owns the three national television channels, an advertising company, Publitalia, and produces its own programmes. At the same time, the government of Berlusconi also controls the public channels. Furthermore, RAI is an important producer for the public channels.

Italian prime time programming is characterised above all by entertainment programming, reality shows and variety show, as well as the sporadic broadcast of big productions.

2000

In Italy independent production companies exist but are not present in prime time programming, since both RAI and Mediaset produce the majority of the prime time programmes. It is worth pointing out the series *I Misserabili* as a contribution to European audiovisual co-production between Mediaset, the French producers GMT and DD Productions, the TF1 network, Taurus Film, the German channel Sat 1, and Rupert Murdoch's American Fox Family Channel.

2003

Firstly, it is worthwhile to point out the similar programme structure of both channels in the first hour of prime time. Whereas RAI 1 broadcasts every day the magazine *I grandi comici*, Canale 5 airs a satiric news programme which reaches a spectacular share. This is the greatest difference between them and tells us about the predominant position of Canale 5 in the Italian television market.

The prime time second hour programme structure is also very similar: series and reality shows occupy most of the days. There is not such a great difference regarding share at this time slot between the two channels.

Concerning production an absolute statement could be made: there is no independent production at prime time. The only company that appears in prime time, RTI, is allied with Mediaset and produces its shows in RTI's studios in Milan. Moreover, each broadcaster produces its own programmes, as the table shows, with very few exceptions. The public network only broadcast programmes produced by them. Among them they contribute the legendary variety *Scommettiamo che...?* that has been on the air for years. The repeat showing of the same programme in the first hour of prime time is surprising. The variety programme *I grandi comici*, is repeated Monday to Friday. In the second hour they combine the fiction series *Salvo d'Acquisto* and *Un papà quasi perfetto*, a co-production of RAI and Clemi Cinematografia, with the reality show *Punto e a capo*, and the variety program *Scommettiamo che...?* and *I raccomandati*.

Mediaset's private television airs programmes produced by the company itself. Just like with RAI horizontal diversity sometimes takes place. Every day during the first hour they broadcast the comic news programme *Striscia la notizia – La voce della renitenza*. The second hour is scheduled for fiction shows, an American movie, the in-house series *Distretto di Polizia 4*, and the production of Mediaset's producer RTI *Il Bello delle Donne 3*. Friday scheduling, as it is frequently the case on many channels, gives way to a reality show.

NETHERLANDS

2000

The Netherlands never ceases to be interesting, taking into account that one of the major European production companies that has managed to export its programmes to the United States is Dutch. Endemol, in alliance with its own production house Grundy and Joop van den Ende TV produces for the private channel of its own domestic market a soap opera *Goede tijden, slechte tijden* instead of the reality shows it makes in every other country.

The private channel's second hour is reserved for the broadcast of the mini-series *Diamonds*, produced by Filmfonds Vlaanderen, Independent Productions, and VTM.

The public television programming is not very significant because various sports programmes were aired during the selected week. All the same, it is worth noting the game show *Body Check*, from René Stokvis of Endemol; the two programmes produced by the main public broadcasting associations Evangelische Omroep and TROS that work with the producer After the Break Productions of Ivo Nieve Productions; and the programme produced by John de Mol, today Endemol Nederland.

This is one of the clearest cases of audience concentration. Endemol captures the major audience portion through the public channel and the private channel.

2003

Regarding the public channel, the strong presence of imported programmes should be noted, especially from American producers, *Cheers*, and European public channels BBC and ZDF. During prime time (first and second hour) there is only the national producer associated with Endemol, Ivo Nieve, with two television programmes, the music programme *BZN ontmoet* and the talk show, *TV Show*. The last one is the top-rated programme for the public channel during the week.

Endemol maintains its presence in 2003. The first hour prime time programme slot is occupied every day by a soap opera produced by Endemol that garners a great share. The second hour, with the lowest share, is also an Endemol's show. The distribution of the daily share among the main television producers reveals interesting findings. Due to the strong presence of American productions in the public channel, Endemol enjoys a nearly exclusive presence during prime time through RTL 4. Endemol in Holland has diversified its own production with the popular soap opera *Goede tijden, slechte tijden*, broadcast daily in the first hour of prime time, the comedy *Adré van Duin op zijn best* and the light information programme *TV Takelaar*. However, Endemol's programmes in other countries are mainly light entertainment.

It is worth noting the presence of the producers 625 TV Producties and Holland Media House in prime time.

PORTUGAL

2000

The private channel rarely produces prime time programmes, but at the same time it also does not contract programmes from independent producers. Foreign companies produce all their programmes. Two are Europeans: Pearson, producer of the game show *A febre do Dinheiro*, and Endemol, producer of *Big Brother*. It also airs the series *Laços de Família* produced by the Brazilian production company Central Globo de Produções of the Globo group. Linguistic similarity facilitates the close commercial and cultural link between Portugal and Brazil.

Neither does public television rely much on national production. Save for the youth series *Riscos*, produced by não informado, the rest of the programmes are movies and the series *Mr. Bean* and *The Simpsons*.

2003

The private channel also broadcasts the reality shows *Idolos* from Fremantle and *Big Brother IV* from Endemol. It likewise aired the comedy *Os Malucos do Riso* from the production company SP Filmes and two telenovelas from NBP: *Saber a Mar* and *O Teu Olhar*.

The public channel broadcasts everyday except Wednesday the game show *O Preço Certo Em Euros* from Fremantle. It also aired the game show *Passo a Palavra* and the series *As Lições do Tonecas* from the producer D&D.

The participation of independent production companies in both the public and private networks has grown from 2000 to 2003.

SPAIN

2000

Prime time programming in Spain is different from other countries, in the first place because prime time begins later than the rest of the

countries. Also, the programmes tend to span the first two hours of prime time. This in part is due to the excess of advertisements that fills the commercial blocks. Although the law 25/1994 does not permit broadcasting more than twelve minutes of spots, the majority of the commercial blocks during prime time surpass that limit, both in the public and the private channel.

The public channel programming in the forth week of September of 2000 is not worth elaborating a comparative study about independent production, since two days were dedicated to football games. However, there are three programmes produced by independent producers, the series *Un Hombre solo*, produced by Gona TV; the magazine *Entre Morancos y Omaita* by Estarciera and the contest of Gestmusic Endemol *Tu Gran día*.

The private channel Tele 5 scheduled various hours of prime time to the production of fiction. Both on Tuesday and on Wednesday it aired a series from the producer Globomedia and the infotainment daily programme *El Informal*. Although at first glance it could seem like a concession to pluralism, in reality it is not, because the principal shareholder of the production company, the Vocento group is on of the listed Spanish shareholders of the channel. Like so many European channels, Tele 5 airs the reality show *Supervivientes* (“Survivors”) from the Dutch company Endemol. It is curious to observe that being as Endemol belongs to Telefonica, the majority shareholder of competitor Antena 3, it is Tele 5 that bought the broadcast rights.

2003

In the Spanish case we have focused on TVE 1 and Telecinco, the national public channel and the first private channel, in September 2003. From the prime time programmes on the private channel we can deduce a predominance of Spanish fiction productions, especially series.

The series *Cuéntame cómo pasó* is an interesting case though, because it is co-produced by two independent producers, Cartel and Ganga. The series show a positive perspective of Franco’s regime. That supposes a different view of those years in Spain and in fact, it could benefit the Party’s government because some media are very much

decided in identifying Franco's dictatorship with President Aznar. It is worth noting that the series' audience share surpasses the sports broadcasts. The other programmes, *Eurojunior* and *Pequeños Grandes Genios*, children contests, are produced by Gestmusic Endemol. Two of the days it broadcasts American films.

In the private channel (Tele 5) there is an apparent pluralism because along with the U.S. series *CSI Miami*, the series *Embrujadas* and the film *Enemigo Público*, the rest of the programmes, *Pecado Original*, *Hospital Central* and *Gran Hermano*, are produced by producers. However, two of those production companies are closely related to the channel. Atlas is a news agency owned by Tele 5 and Zeppelin belongs to Endemol (Telefonica). So the only independent producer from the legal point of view is Videomedia, who produces *Hospital Central*.

SWEDEN

2000

The majority of the programmes broadcast by public television are produced by themselves. The lone exception is the English series produced by ITV. Although it does not count toward the percentage of recent works, it is significant as a European production. The origin of the private channel's programmes is more varied. It relies on productions from independent producers like Meter Film & Television, Jakowski Enterprises, MTV Mastiff and Pearson TV. It also airs several of its own shows like the magazine show *Kalla fakta* and the variety programme *TV4 10 år*, and three American series, *Arkiv X*, *forts*, *Ally McBeal* and *Providence*.

2003

Public television's tendencies were maintained in 2003. The majority of the variety programmes, quiz shows, magazine shows and series are produced in-house. The only two exceptions are the documentary *Per Gessle – ta en kaka till!* produced by Kerberos Filmproduktion HB and the opera musical *Eugen Onegin* produced by Bel Air (France). The impulse toward European production is notably showed by the co-production with the Norwegian company NRK of the detective series *När djävulen håller ljustet*.

The diverse origin of the production of programmes for the private channel is repeated again in 2003 along with most of the same producers. The producers that did not appear in 2000 were Strix television that produced the reality show *Farmen*, and Nordisk Film TV-Produktion, producer of *Saknad*. The programmes however are different, with the exception of the society magazine show *Kalla fakta*, which moved to Mondays. The presence of English and Nordic productions continues to be significant. The documentary movie *Monarkins sista hopp* from Carlton was aired along with the series *Nikolaj & Julie* from the Danish public service television DR. The presence of American programmes like *Alias* and the series *24* also continues.

UNITED KINGDOM

2000

As a public channel the BBC has a clear commitment to the production of quality programmes. Among all of the programmes that it airs in prime time that are produced in-house are the legendary soap opera *East Enders*, in direct competition for years with the private channel ITV's *Coronation Street*, the documentary *Britain Running Dry*, the talkshow *Parkinson* and the docusoap *Airport*. Independent production is carried out by two production companies, Bazal of Endemol, that produced the docusoap *Vets in practice* and the lifestyle programme *Changing rooms*.

The third channel, the ITV network, with fifteen regional licences, is also an important producer, above all through Granada. This is the producer of the popular series *Coronation Street* that is interchanged with the other successful series *Emmerdale* from the Granada production company Yorkshire. It also airs the popular game show *Who Wants to be a Millionaire?*, a Fremantle title that is produced by Celador in the United Kingdom. For the rest of the days of the week, Carlton produces the series *The Bill*.

2003

The BBC's programming schedule has barely changed in three years. The series *East Enders* continues along with the programmes produced by the public channel themselves. In 2003 they broadcast two programmes from independent production companies, *Ground Force America* from Endemol, and the comedy *My Hero*, from Big Bear Films.

It is also important to notice as an aspect of differentiation for the BBC the abundance of garden lifestyle programmes (Taylor, 2002). These programmes can be understood as a way of carrying out its public service function.

As far as ITV goes, it is important to note that since Yorkshire and the producer Thames of Carlton are all part of the same group, there is only one programme that does not belong to Granada, the drama *Trial* and *Retribution* from La Plante Productions.

Despite the abundance of independent producers that exist in the United Kingdom, there are few that are able to successfully sell their programmes to the national television channels (Paterson, 1990; Baker, 1994). There is a double explanation for this fact. For one thing, both the BBC and Granada are expert production companies that enjoy competitive advantages compared to others, among other things, they are the owners of the channels. On top of that, in Great Britain there exists Channel 4 that airs chiefly independent productions. Still, there can be a disadvantage for production companies in the fees that this small-audience channel pays out in comparison to audience leaders the BBC and ITV.

The duplication of the same type of content on the two channels is clear: both air soap operas in prime time, especially during the first hour. In the BBC's case, all of the programmes except two are in-house productions. ITV entrusts most of its programmes to Granada, and in second place to Granada's production house, Yorkshire. Between the two channels names of other production companies hardly appear on prime time programmes.

The relationship between the prime time producers and the television channels in Great Britain is extremely clear. On one hand, the BBC, as a public channel funded by the licence fee, has a great tradition of programme production. Every day of the week, except for Wednesdays, the BBC obtains a share superior to 50% on the prime time first hour programme.

The case of ITV does not vary much from that of public television. Granada production belongs to the group that owns one of the regional (Manchester) television licenses that make up ITV. Its experience in the market has consolidated its hold on production through the years, especially with the soap opera *Coronation Street*, which has been on

air during more than forty years. This explains why Granada produces the majority of the programmes on prime time on ITV. In this way, Granada obtains a share superior to 50% three times a week. The days when it does not reach this, Tuesdays and Thursdays, Yorkshire, property of Granada, obtains a high share, near 50%. So its capacity to garner audiences is again bigger through its production arm than through the television license. In 2003 this company merged with another regional television license in London, Carlton TV.

4.3. Production of fiction

Television fiction is the genre most representative of the maturity of national production because it is the genre that best reflects the cultural values of the domestic audience and gives a network's programming the strongest possibilities of image construction, identification, and loyalty. At the same time, the life cycle of series demonstrate talent to adequate to the interests of the public and technical and professional skill in production. According to Buonanno (2002: 5), "television fiction sector is notoriously the most prestigious and costly of the contents". Furthermore – he continues-, "European national fiction is still today an important structural component of the schedules of public and private channels, and a means of great successes: a sign of its lasting ability to gain and hold the favour of the local audiences. Many broadcasters have considered it the strategic content of programming" (Buonanno, 2002: 10).

At the same time, in some cases fiction is produced by the networks themselves but in others it is produced by independents. According to the European Audiovisual Observatory (Jezequel; Lange, 2000: 1-12), in 2000 Spain was the country with the largest percentage of independent fiction producers (87.6%), followed by France (86.6%) and Italy (82.2%). In the United Kingdom 62.1% of fiction producers belong to a communications group, and in Germany, 53.5% do.

A publicly financed fund—COSIP—exists in France for the production of fiction, documentaries and animation. Ahead we will explore those series broadcast by the channels under study that were on the air in either 2000 or 2003. Standing out among the producers

that appear in the table are Son et lumière, which co-produces with France 2 the series *Avocats et associés*; Epsilon and Ena in Greece, which produce series for the private channel; and Endemol in the Netherlands, which produces the series *Goede tijden, slechte tijden* instead of the reality shows that it produces everywhere else. In the UK, although the production companies Granada, Yorkshire and Carlton appear, they can not be considered independent since the three are owners of regional ITV licenses.

Table 17.

National Fiction (2000 – 2003)

C/	TITLE	CHAN- NEL	PRODUCER	TOP AUDIENCE			
				2000		2002/2003	
				Share	Rtg	Share	Rtg
AUS	Siska	ORF 2	ZDF, ORF, SF, DRS	37%	12%	19%	8%
BE	Thuis	VRT	VRT	33.2%	14.2%	33.5%	12.5%
	Familie	VTM	VTM	34.5%	14.0%	39.98%	13.71%
DN	Hvide Løgne	TV 3	TV 3	8.92%	2.97%	n.a.	n.a.
FR	Avocats et associés	France 2	Son et lumière/ France 2	26.7%	9.9%	16.3%	3.1%
GE	Die Kommissarim	ARD	ARD/Monaco Film	n.a.	n.a.	22.8%	6.340.000 (*)
GR	Konstantinou Kai Elenis	ANT 1	Epsilon	33.8%	9.8%	21.0%	6.7%
	Eglimata	ANT 1	Ena Production	33.5%	10.1%	21.5%	7.3%
IR	Fair City	RTE 1	RTE TV	43.3%	15.4%	48%	14.7%
NL	Goede tijden, slechte tijden	RTL 4	Endemol/Grundy/ John Van Ende	31.6%	10.7%	29.9%	11.1%
SW	Kalla fakta	TV 4	TV 4	8.9%	3.6%	24.2%	9.2%
U.K.	East enders	BBC	BBC	53%	11.9%	57.63%	12.69%
	Coronation Street	ITV	Granada	67%	15.2%	60.59%	13.69%
	Emmerdale	ITV	Yorkshire	48%	9.64%	49.95%	13.59%
	The Bill	ITV	Carlton/Thames	30%	7.83%	33.29%	7.33%

(*) Number of viewers.

The largest audience share of every country during this time frame has been chosen for study. In some countries, like Belgium and the UK, both the public and the private channels are the ones who produce the series. In other cases it is only the public channels that produce and broadcast these series—Austria, France, Germany and Ireland—and in other countries it is the private channels that play this role—Denmark, Greece and the Netherlands. Lastly, in various countries like Austria, France, Germany and the Netherlands, the companies, both public and private, co-produce their series with independent producers.

Generally the first countries are those where the dual system is balanced and the importance of the channels has been distributed between public and private. In other countries, the public channels have greater pull in the market and a larger tradition of programme production. The third group of countries, save for Denmark, are those where the participation of the public channels in the market is small (Table 2).

The audience loyalty toward fiction series in the United Kingdom stands out, above all in the case of *Coronation Street* which accumulates more than 60% of the audience and has been on the air since 1960. The series *East Enders* from the BBC also has an elevated share of over 50%, both in the UK and also in Ireland, where it is successfully broadcast on the public channel. As Webster and Lichty (1991: 29) say, “ratings data may be of some value, but as much as anything else, the business of programming requires a special talent for anticipating popular trends and tastes, and setting in motion production that will cater those tastes”.

Audience loyalty in almost every case is maintained with small ups and downs. The rise in the audience of the Swedish series *Kalla fakta* is noteworthy, however. Its explanation is perhaps due to a simple change in day: in 2000 it was aired on Thursdays and in 2003, on Mondays.

The majority of these programmes have audience shares greater than the average of the channels that air them. If the capacity of influence

that these series have is considered, it is fitting to label their authors, national production companies, with a power of influence greater than that of the networks' owners.

4.4. Some conclusions

The study of prime time shows that some production companies can have a large power of influence because their programmes earn elevated audience shares. In many cases these production companies are integrated into communication groups that own television channels. Along with accumulating more power of influence, this aids the control of content distribution, which can increase return on investment and thus aid their bottom line. These production companies are Endemol and all of its subsidiaries, closely linked with Bertelsmann's channel RTL4 spread throughout Central Europe or Bavaria; and the English producers Granada, Carlton, Yorkshire, and Pearson with their connection to regional licenses of the British channel ITV.

Other production companies exist that also have a presence in their respective markets and are independent. This independence gives them certain autonomy to decide on the content of the programmes they produce, but they do not enjoy the support of a large media group for international distribution.

At the same time a few channels stand out as the producers of their own programmes, such as the BBC, whose programmes are also exported, and the Italian companies Mediaset and RAI. In this last case it is worth pointing out the co-production agreements with European countries that both the public channel and the private company have developed. The public channels support for co-production accords with independent producers should be highlighted.

Next table shows the turnover of some of these companies. All of them are among the fifty worldwide leading audiovisual companies. It is interesting to outline that there are not only private companies, but also public ones and producers.

Table 18.

*Turnover of top leading audiovisual companies world wide (2001)
(USD million)*

Ranking	Public TV	Private TV	Producer	Country	Turnover
1		Bertelsmann		GE	6 566
2	ARD			GE	5 024
3	BBC			UK	4 818
4	RAI			IT	2 880
5		Carlton		UK	2 354
6		Granada		UK	2 197
7		Mediaset		IT	2 122
8		TF1		FR	2 049
9	France 2			FR	1 271
10		Telefonica		SP	1 237
11			Endemol	NL	806

In summary, in Austria, Denmark, Germany, Finland, France, Italy, Spain, Sweden and the United Kingdom the producers of public channel programming are mainly the broadcasters, themselves. In Netherlands, however, the public channel does not produce any prime time programme but instead broadcasts foreign programmes from Europe and the US. Production for private channels is also very concentrated. It mainly depends of one producer, Endemol.

In Austria and Germany, the one main producer is the broadcaster, RTL, as in Italy, where the producers are RAI and Mediaset. In the United Kingdom Granada is the main producer; in Belgium, Studio's Amusements; in the Netherlands, Endemol, and in Spain there are some producers such as Videomedia, Globomedia, Gestmusic Endemol and Cartel and some US programmes. In Spain in the years studied, although there is the appearance of independent production, in reality that is not the case, because the private channel's production companies are owned by one of the shareholders of the television companies.

France is the only country with different independent producers in prime time. However, the most important ones are GMT and Quay Sud. In France public service is understood to be accomplished through the development of co-production projects with other producers and by buying many programmes from independent producers (Bottéon, 2003). In this manner it is also worth pointing out the Greek private channel's support for independent production. Co-production is also common in public channel in Finland. According to Hujanen (2002: 31), "in Finland, the role of independents has been steadily growing in the course of 1990s. The private channel MTV 3 has externalised most of its programme production and YLE also uses a considerable amount of domestic independent production".

The Nordic countries, Denmark, Sweden and Finland have their own, tightly interwoven industry, and lastly, the countries of Central Europe, Germany, Austria and Belgium, have public channels with vast production experience.

Two countries that seem to be at the tail end of television production development are Portugal and Ireland. The former depends on the acquisition of foreign entertainment programme formats for both public and private channels, and the Irish channels still depend on American production and British exports. American programmes are still present in private channels in Denmark, Spain and Ireland, and even in the Spanish public television channel.

From this analysis it is possible to have doubts about pluralism in the television programming during prime time because there are few producers who are able to get the audience ratings demanded by national leader television channels. Therefore, it seems that the Directive has encouraged public and private broadcasters to increase its production through vertical integration processes. Most of the public channels accomplish this by directly producing their own programmes; the private ones through the acquisition of programmes from affiliated companies. So what should be questioned is whether independent production in terms of ownership is the best way to encourage pluralism and diversity.

5. Summary of fundings

5.1. Conclusions

The first conclusion that should be noted is that American production hardly exists on European channels. The majority is national production, either produced by the networks themselves or contracted to independent producers. The exceptions are the Dutch public channel, the Irish private channel TV3 and the Spanish ones. Thus, fourteen years on, the first objective of the European Directive, diminishing the presence of American programmes and increasing European production has been accomplished.

Domestic production has grown in Europe due to the increasing number of alliances between production companies and television channels. Moreover, rather than programmes produced by independent companies, the number of programmes produced by the channels themselves has also risen.

With regard to production, after the analysis of who produces programmes for the public and the private channels in the fourteen countries, it is possible to conclude that though the number of producers has increased in most countries, pluralism is curtailed. This is because owners of private television companies also own the prime time production companies, at least in Italy, the Netherlands, the United Kingdom, Spain and Germany. In the Netherlands, however, the public channel does not produce any prime time programming, instead opting to broadcast foreign programmes from Europe and the US. Production for private channels is also very concentrated. It mainly depends of one producer, Endemol. In Germany, the main producer is the broadcaster, RTL. The same is true in Italy, where the producers are RAI and Mediaset. In the United Kingdom Granada is the main producer and in the Netherlands, Endemol.

The public channels still produce most of their prime time programming. In fact, as Hujanen (2002, 31) outlines, “despite the so called

externalisation, production remains a central function in modern European public service broadcasting”. The same author continues, “some European public broadcasters retained what is called ‘integrated factory’ model, referring to vertically integrated broadcasters which make the bulk of their programmes themselves in their own studios” (Hujanen, 2005: 71). According to the BBC, independent productions are expensive: “the BBC claim that independent productions are more expensive than in-house productions. There are two potential reasons for this: for cultural reasons, scarce talent finds it easier to demand more money in independent companies than in larger integrated broadcasters, and talent is not homogeneous, and good talent that has proved itself can set up as independents and capture its rents (Arthur Andersen, 1998: 47).

At the same time, however, some countries’ public networks bet on a more varied programming strategy: more centred on news programming in some cases, and in the extreme, channels like RTP in Portugal, which airs a game show every single day. Some public channels, like the Swedish channel and the BBC, recognise that one way to fulfil their public service obligation is to offer educational programmes aimed at homelife. The Dutch public broadcasters are legally bound to offer a complete range of programming, including 20 % cultural and 30 % educational and informative programmes (Wurf: 2004, 221).

France is the only country with different independent producers in prime time, with the most important ones being GMT and Quay Sud. In that country the obligation for public service has been understood as the development of co-production projects with other producers and the purchase of many programmes from independent producers (Bottéon, 2003).

At the same time it is illustrative to know the reasoning behind the programming decisions made by the channels. David Graham and Associates (2004) conducted a survey of European broadcasters and independent producers. Ahead, some of the conclusions will be shown. Among the priorities of advertising-funded broadcasters for commissioning programmes are: audience taste (96%), editorial policy and competitive advantage (84%), programme budget (80%), advertising needs (44%), national public service obligations (24%), and articles 4 and 5 89/552 EC D and public subsidy (20%). For the public

funded broadcasters there is a slight difference: 80% decide according to audience taste, 77% according to national public service obligations and editorial policy, then comes programme budget (67%), articles 4 and 5 (60%), competitive advantage (57%), public subsidy (37%) and advertisers needs (30%). The second illustrative response for our purposes was related to the influences on broadcaster commissioning of independent production. The responses were, firstly, quality and appeal (95%), price (64%), primary and secondary rights (55%), national public service obligations (53%), article 5 (38%) and commercial revenue streams (35%). So, the growing of the European audiovisual market has not caused by the legal framework, rather from market forces. The third question polled shows the existence of strong and competitive production companies with the capacity for exploiting secondary rights in different windows and international markets. When all independent producers were asked, "Do you retain more rights to programmes you have produced than you did 10 years ago?" 80% answered "yes" and 20%, "no". In the end, copyright is the core of the business.

If commercial broadcasters are in the business of producing audiences to be sold to advertisers, then they will try to get the largest audience through their programmes. Therefore, if channel owners are competitive and advertiser supported, programming decisions will show a strong tendency toward duplication, as they are pressured to rely on the same kind of programming. Television channels will offer duplicates of programming types that have large audiences if fractions of these audiences are larger than the audience of a single programme for a minority taste audience. Although public and commercial television may not in every case compete for the same source of income, in practice in Europe both try to reach the maximum audience.

Many independent producers often make minority programmes. If popular programmes are available in public and commercial channels, the pay television channels have no other choice but to cater to minority interests. This is why minority programmes made by independent producers may find a place there. However, access to these programmes requires a direct payment and for this reason, many people cannot enjoy the programmes made by independent producers, so the programmes made by big producers are frequently the ones available to the mass audience.

From our market analysis we have realised that there are very few independent producers in the prime time line-ups of leading television channels, so it is difficult to think that pluralism has been guaranteed. On the other hand, for most of the production companies the only way to remain in the market is to be related to a television company. A few production companies have consolidated their positions. They produce more than five programmes a year and also have an international presence. The most notable example is Endemol and the exportation of its programme *Big Brother* throughout the world (Corcoran, 2004: 201-203; Wilson, in Murray; Oullette, 2004: 323-343).

In this sense there is no shortage of those who affirm that the power of production companies is greater than that of the networks, even suggesting that “networks are not important anymore,” especially when faced with foreign producers (Planas, in Igartua; Badillo, 2003: 93). However, many of these producers cannot be considered independent from the legal point of view.

From this analysis it is possible to doubt the pluralism of the television programming at prime time because there are few producers who are able to get audience ratings for national leader television channels. Therefore, it seems that the Directive has encouraged public and private broadcasters to increase their own production through vertical integration processes. Most of the public channels do so by directly producing their own programmes; the private ones do so through the acquisition of programmes from affiliated companies. So what should be questioned is whether independent production in terms of ownership is the best way to encourage pluralism and diversity.

5.2. Discussion

The first question to be answered is whether the best way of guaranteeing independence is to limit the ownership of producers from broadcasters. European production has increased in the television channels, however most of this production comes from producers related to television broadcasters. In truth, an ownership link does not prevent

the independence of a production company. In practice there have been cases in which the channels have not bought the programmes produced by their own production companies. For example, Antena 3 TV rejected *Gran Hermano (Big Brother)*, produced by Gestmusic Endemol, which was then successfully broadcast by its competitor, Tele5.

On the other hand, the close relationship between a production company and a television channel can be useful to ensure the programming policy of the channel and to differentiate it from competitors. Both the production company and the television channel can gain audience loyalty and present an image of a solid and coherent brand.

Having television companies as shareholders does not guarantee the independence of the producer companies when the broadcasting channels force them to sell their exclusive rights. This tends to happen to the production companies that totally belong to one broadcasting channel. Also, according to the rules of the broadcasting market, the production companies, whether they are independent or not, in the end are absolutely dependent on ratings. When programmes do not reach their foreseen ratings the contracts with the production companies are automatically rescinded, and thus, in many cases there is no return on investment, personnel are dismissed and sometimes a creative idea is wasted. The threat of not reaching the foreseen ratings is a source of insecurity for production companies. In fact, most of them only produce one programme per year and only few of them survive in the marketplace because the capital return is very small. The leading television channels generally only bet on programmes that are successful in prime time. In this way, only the large production companies are able to sell their programmes. In conclusion, one can point out that ownership independence is not a valid criterion for guaranteeing the growth of the production sector.

In summary, independent producers are not completely independent once they get funding from television channels (Richeri, 1994: 79). Moreover, another place where producers lose power is in the secondary rights. Generally, the producers are small companies, not very structured, and they do not have international agents to exploit the rights of programmes after their initial broadcast. So the television

companies are the ones who usually own the secondary rights and the copyrights of the programmes. Producers do not assume the commercial risk (Bustamante, 1999). Good ratings are thus the only way for producers to have a powerful position in their negotiations with broadcasters (Alvarez Monzoncillo; López Villanueva, 1999).

This leads us to reflect on ownership being the key to independence, or, whether, on the contrary, if one should point out other criteria to determine the effective independence of production companies, taking into account that the existence of the independent producer companies can favour pluralism and diversity. In fact, current discussions about the definition of independent production have added two new criteria toward this goal. These criteria are related to the amount of programming supplied to the broadcaster and the ownership of secondary rights (COM, 2002).

The only advantage of being independent for producers is access to funding from Media Programmes and Euroimages. Most of their aid is already directed to independent producers. However, every economic aid must be adapted to the criteria established by the same programmes.

Pluralism is identified as various voices producing for television. Nevertheless, pluralism as such has not been possible because of the structure of the market itself: the strong dependence on ratings; the scarcity of generalised channels; and the duplication of contents in the national channels –in fact, they broadcast the same type of programmes– all mitigate against pluralism.

Finally, the study of the power of some production companies may attract the attention of legislators. The present study demonstrates that more effective measures for safeguarding pluralism are needed that not only avoid the external concentration of channels according to the audience share they earn but also by the number of real voices that contribute to the content these channels broadcast. External pluralism will not be complete if internal pluralism is left unattended.

So perhaps looking for new ways of guaranteeing the independence of producers is needed to encourage European audiovisual production and pluralism in television channels. Lastly, we propose new ways to set the relationship between producers and television channels.

5.3. Proposals

Keeping in mind that one of the measures to promote pluralism from the point of view of programming sources is to increase the programmes produced by independent producers, we would like to suggest some proposals.

First, to re-think the definition of “independent” producer. In reality, European producers need vertical integration to be competitive both in national and international markets (Doyle, 2002: 25). So, independence can be related not only to ownership but also to copyright independence and distribution rights. If producers have the financial support of the television companies and can exploit the content rights in the secondary markets, they can be more competitive and able to have a stronger position in the international market (Vogel, 1998: 211; Doyle, 2002: 56).

Each European country will have to decide what they consider to be an independent production company. Along with ownership, there are other means to guarantee the independence of production companies. Perhaps European legislators and national governments should try to improve independence through other means.

According to the review of the *Television Without Frontiers* Directive, the Greek Association of Independent Producers (SAPOE) proposes the objective of achieving a flexible set of key criteria that will contribute to the recognition of independent production in Europe while preserving the ability of individual member states to define independence.

The key criteria would include:

- a) The transfer of intellectual property rights back to the producer after a maximum period of three years;
- b) A re-examined notion of the majority ownership link between producer and broadcaster according to new market developments;
- c) The freedom to choose an international distribution company.

The Greek producers promote tools such as “Codes of Practice” to achieve an adequate balance between independent production and broadcasting sectors.

Some other aspects should be taken into account, such as guarantees of the permanence on air of programmes to at least recoup the production costs to producers. Television companies should assume the investment of all the produced episodes, instead of paying only for the broadcast ones.

Co-production projects between producers and public television channels can be also a good way to promote pluralism through independent producers. Moreover, they are a good method of sharing know-how and experience in the production of high quality programmes (Baltruschat, 2003). In those projects, television channels could bring technical support and talent and creativity should be a produced competence. Thus an editorial independence with respect to scripts should be guaranteed. Both television companies and producers should share secondary rights revenues.

Perhaps regulation must address the protection of production companies during negotiations with television networks in order to assure that any negotiation is favourable for both sides with regards to decisions on who will assume artistic, financial and technical responsibilities (Pardo, 2001). Fundamentally, producers must share the responsibility of script development, access to copyrights and exploitation rights, the contracting of personnel, the distribution of the production budget, and the contribution of technical equipment. In this way the control of property does not become the only relevant issue, and perhaps this industrial structure would allow more producers to achieve airtime on national channels.

Pluralism is not only a function of having 10% independent programming, but also of having more television channels with different functions and type of programmes. On the other hand, maybe it is necessary to consider other ways to promote pluralism. Pluralism is not only a question of increasing independent production. Maybe if more national channels are launched to broadcast different kinds of programming addressed to niche audience, the possibilities of producing programmes with smaller, but still successful ratings would increase for independent producers. In this manner, the British Channel 4 committed itself to a large part of its programming coming from independent

production sector (Hujanen, 2005: 71; EAO, 2001: 23). The Finnish channel Nelonen, Fashion TV in Austria and the cultural channel Arte in Germany and France can also be good examples to follow.

In its mission statement, Channel 4 asserts is committed to a large part of its programmes coming from the independent production sector: “We wish to ensure that the independent sector retains its diversity and capacity to grow in a world where power is passing to international converged producer broadcasters” (Channel 4). Nelonen (Channel 4) was created in 1998, and 30% of its programming comes from independent producers. The programmes of the specialised 24 hour-a-day channel Fashion TV are not made for any other television broadcasters, and independent productions account for 100 per cent of broadcasts. The producers of the programmes are all based in EU member states. It is, however, a satellite television broadcaster, and it received its broadcast licence in July 2002 (COM, 2004).

Some channels have contributed to strengthening European audiovisual production and encouraging pluralism, stipulating guidelines different from those established in the ED 89/552. Sweden is a clear example. Its measure for fomenting pluralism determined that production must originate in places other than Stockholm. It considered that geographic decentralisation would favour diversity. At the same time the public channel was considered as a guarantor of programme quality.

Perhaps one of the missions of public channels can be tied to the promotion of independent productions, as is done in some countries. One measure could be setting a broadcast quota for independent production that surpasses that of private channels, as occurs in Denmark, Ireland, Italy, and the Netherlands, or being the leaders of co-production agreements with independent producers, as French television does and as the Nordic countries have done through the Northvision association created by public channels.

In agreement with Blake and Lovegrove (1999: 25), “many broadcasters –including the BBC, FR3, RTVE, RAI- have created internal markets to enhance the efficiency and effectiveness of their in-house production departments: since they can give commissions to outside production

units, their own must work more cost-effectively such an internal market has the further effect of strengthening the local production industry”. The process of *commissioning* run by YLE in Finland and BBC in United Kingdom permits producers to have a formal contractual relationship with resource suppliers and channel controllers who commission and schedule their programmes (BBC, 1992). As Hujanen (2002, 103) outlines “the actors of internal market should be competitive with the actors of the external market of the independent production”.

If national governments and the European Commission concern themselves with strengthening European production and generating quality products, one available method would be financing specific productions through the networks. Instead of wasting public money in run-down channels that do not fulfil their social public service function, aid could be directed to high-quality productions that require elevated budgets. Obligating the involvement of networks is one measure to guarantee the principal exploitation of these programmes. Though audience ratings would not be high, the networks would be able to compensate for the loss of income thanks to the cut in costs.

As Hirsch and Petersen say, “present regulation and regulation are based on a territorial concept with the digital environment puts into question” (Hirsch; Petersen, in Mc Quail; Siune, 2004: 217). The new digital environment, especially digital terrestrial television, offers a new panorama in which independent producers could improve their position. The increasing number of channels, most of them free channels, requires more television content. As Hellman outlines, “during the next few years digitalisation will change the overall pattern of programme schedule” (Hellman, 2001: 202) Bearing in mind this new arena, legislators could play an important role by establishing some measures that could make differentiation among channels more effective. Thus independent productions could find a real place.

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Spain: Comisión del Mercado de las Telecomunicaciones (<http://www.cmt.es/>)

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Anexes

Annex I. List of graphics and tables

Graphic 1. Diversity of supply and demand

Graphic 2. Averages of European production and independent production in EU member states (1999-2002)

Table 1. Legal independent producer definition

Table 2. Market share of leading channels (1990 – 2003)

Table 3. Proportion of independent production (1994-2002)

Table 4. Number of independent producers and programmes produced. Spain (1997-2002)

Table 5. Country of origin of Portuguese programming (2003)

Table 6. Bertelsmann audiovisual ownership

Table 7. Endemol Holding in Netherlands

Table 8. Programmes produced by Globomedia. Spain (2000 – 2001)

Table 9. Programmes produced by Gestmusic Endemol. Spain (2000 – 2001)

Table 10. International distribution of programmes from Endemol and Fremantle (September 2000/2003)

Table 11. Broadcasters and programmes produced by integrated production companies. Spain (2000 – 2003)

Table 12. Producers of prime time of public channels (2000)

Table 13. Producers of prime time of private channels (2000)

Table 14. Producers of prime time of public channels (2002/03)

Table 15. Producers of prime time of private channels (2002/03)

Table 16. Audience share of the series produced by independent producers (2003)

Table 17. National fiction (2000 – 2003)

Table 18. Turnover of top leading audiovisual companies worldwide (2001)

Annex II. Main European producers

COUNTRY	PRODUCER (OWNER)
AUSTRIA	MR TV-FILM Produktionsgesellschaft m.b.H. & Co KG INTERSPOT FILMGESELLSCHAFT MBH SATEL Fernseh-u.Filmproduktionsgesellschaft m.b.H. DOR FILM-Produktionsgesellschaft m.b.H. EPO-FILM Wien / Graz Produktionsgesellschaft m.b.H.
BELGIUM	Woestijnvis Studio 100 TV De Wereld Kanakna Televisiefabriek
DENMARK	Nordisk film and TV Metronome Productions A/S Scandinavisk Film Kompagni A/S STV Television Nordic Entertainment
FINLAND	Broadcasters Oy CreaVideo Fremantle Entertainment Oy Metronome Film & Television Oy Nordisk Film & TV Oy Filmiteollisuus Fine Oy Production House Oy Finland Jarowsky Suomi (15% MTV)
FRANCE	France 2 Réservoir Prod Quai Sud GMT Production Endémol Production
GERMANY	Bavaria Film GmbH (70% ARD) Studio Hamburg Produktion für Film & Fernsehen GmbH (75% ARD) Ufa Film&TV Produktion (100% RTL-Group (CLT)) Ndf GmbH (90% Kirch-Group) Endemol Entertainment Produktions GmbH Entertainment Service GmbH
GREECE	KINO Anosi On Productions STEFI V. Katsoufis – V. Pietra Studio ATA (Lamprakis Press S.A. - 95%) D. Kouredis (5%)

Annex II. Main European producers (cont.)

IRELAND	RTE Tyrone
ITALY	Lux Vide RTI (Mediaset) Aran Endemol Fascino Film Master
NETHERLAND	Endemol Holding (Telefonica) René Stokvis Productions (Endemol) Ivo Niehe Productions (Endemol) Grundy/Endemol (RTL/Endemol) Chrysalis
PORTUGAL	CLAP – Produção de Filmes, Lda D&D – Audiovisuais, SA Endemol – Prod. Televisivas, Lda Pearson – Produções de Televisão, SA Mandala- Produção e Comunicação, Lda.
SPAIN	Gestmusic Endemol (Telefonica- La Trinca) Globo Media (Vocento) Europroducciones (Vocento 70%) Zeppelin (Telefonica) Videomedia
SWEDEN	MTG (Stenbecksfären) Metronome (Schibsted – 65%; Endemol – 35%) MTV Produktion (Kimevik – 42.6%; Atteholm Hakkan – 6.5%; EK Raymond - 6.5%; Fommvik Mats – 6.5 %; Handelsbankens - 4.8%; others – 26.5%) Prisma Outside Broadcasting (Ulf Ahnstedet – 35%; Hans Öberg - 35%; Roger Holtback - 25%) Jarowskij Enterprises (56% Amplico)
U. KINGDOM	Granada + Carlton (A quoted company (no single owner has more than 5 per cent) Yorkshire (Granada - 100%) Bazal (Endemol - 100%) Lion (Privately owned) Celador (Complete Commnication Co. - 100%) Thames TV (Fremantle)

Annex III. Prime time programming¹, audience and producers (2000&2003)

AUSTRIA

2000 (11 – 15 sept.)

PUBLIC CHANNEL ORF2 – 32.9%

	MONDAY 11	TUESDAY 12	WEDNESDAY 13	THURSDAY 14	FRIDAY 15
20:15	<i>Der Landarzt</i> (series) Terranova/ZDF /ORF Share: 30% Rating: 11%	<i>Universum</i> (documentary) Co-productions Share: 32% Rating: 11%	<i>Help TV Spezial</i> (magazine) ORF Share: 39% Rating: 12%	<i>Universum</i> (documentary) Co-productions Share: 30% Rating: 10%	<i>Siska</i> (series) ZDF Share: 37% Rating: 12%
21:15	<i>Thema</i> (magazine) ORF Share: 36% Rating: 12%	<i>Der Report</i> (magazine) ORF Share: 26% Rating: 8%		<i>Vera</i> (talk-show) ORF Share: 34% Rating: 12%	<i>Lebensretter</i> ORF Share: 28% Rating: 8%

PRIVATE CHANNEL RTL – 6.2%

	MONDAY 11	TUESDAY 12	WEDNESDAY 13	THURSDAY 14	FRIDAY 15
20:15	<i>Feuerengel</i> (series) Odeom Film/RTL Share: 2% Rating: 1%	<i>Doppelter Einsatz</i> (series) RTL Share: 7% Rating: 2%	<i>Champions League</i> (football) Share: 5% Rating: 2%	<i>Die Motorrad Cops</i> (series) RTL Share: 5% Rating: 2%	<i>Quiz Einundzwanzig</i> (game-show) RTL Share: 8% Rating: 2%
21:15	Hinter Gittern (series) Grundy UFA TV Produktions GmbH/RTL Share: 6% Rating: 2%	<i>Im Namen des Gestzes</i> (series) RTL Share: 6% Rating: 2%		<i>Big Brother</i> (reality-show) RTL II Share: 3% Rating: 1%	<i>Nikola</i> (comedy) RTL Share: 5% Rating: 2%

¹ Information given: name of the programme; type of programme according to national consultants; producer; share; rating. From prime time, peak-time hours are selected in each country. Share is the percentage of viewers using television tuned to a particular programme or channel at a particular time and rating, the percentage of a given population group consuming a television programme at a particular moment.

AUSTRIA
2003 (8 – 12 sept.)
PUBLIC CHANNEL ORF2 – 30.0%

	MONDAY 8	TUESDAY 9	WEDNESDAY 10	THURSDAY 11	FRIDAY 12
20:15	<i>Weissblaue Geschichten</i> (series) ZDF Share: 38% Rating: 14%	<i>Universum</i> (documentary) Co-productions Share: 31% Rating: 12%	<i>Scheidung Mit Hindernissen</i> (tv-movie) Share: 25% Rating: 10%	<i>Universum</i> (documentary) Co-productions Share: 34% Rating: 13%	<i>Siska</i> (series) Co-production ZDF/ORF/SF DRS Share: 19% Rating: 8%
21:15	<i>Thema</i> (magazine) ORF Share: 35% Rating: 13%	<i>Sommersgespräche 2003</i> (polit-talk) ORF Share: 19% Rating: 7%		<i>Vera</i> (talk-show) ORF Share: 35% Rating: 13%	<i>Zurück ins Leben-Hilfe für die Seele</i> (documentary) ORF Share: 17% Rating: 6%

PRIVATE CHANNEL RTL – 5.9%

	MONDAY 8	TUESDAY 9	WEDNESDAY 10	THURSDAY 11	FRIDAY 12
20:15	<i>Die Ultimative Chart Show</i> (music-show) RTL Share: 9% Rating: 3%	<i>Millennium man</i> (series) RTL/Paramount Share: 4% Rating: 1%	<i>Deutschland sucht den superstar</i> (casting-show) RTL Share: 8% Rating: 3%	<i>Alarm Für Cobra 11</i> (TV-Movie) RTL Share: 5% Rating: 2%	<i>Wer Wird Millionär</i> (quiz-show) RTL Share: 6% Rating: 2%
21:15		<i>Im namen des gestzes</i> (series) RTL Share: 4% Rating: 1%	<i>Die ddr Show</i> (show) RTL Share: 5% Rating: 2%		<i>Mein Leben & Ich</i> (series) RTL Share: 4% Rating: 1%

BELGIUM

2000 (25 – 29 sept.)

PUBLIC CHANNEL TV1 – 31.3%

	MONDAY 25	TUESDAY 26	WEDNESDAY 27	THURSDAY 28	FRIDAY 29
19:00	<i>Man Bijt Hond</i> (entertaining magazine) Woestijnvis Share: 35.7% Rating: 12.5%	<i>Man Bijt Hond</i> (entertaining magazine) Woestijnvis Share: 34.7% Rating: 12%	<i>Man Bijt Hond</i> (entertaining magazine) Woestijnvis Share: 33.8% Rating: 11.6%	<i>Man Bijt Hond</i> (entertaining magazine) Woestijnvis Share: 33.2% Rating: 12%	<i>Man Bijt Hond</i> (entertaining magazine) Woestijnvis Share: 32.5% Rating: 11%
20:00	<i>Thuis</i> (soap) VRT Share: 30.8% Rating: 12.8%	<i>Thuis</i> (soap) VRT Share: 30.8% Rating: 12.8%	<i>Thuis</i> (soap) VRT Share: 31.4% Rating: 12.7%	<i>Thuis</i> (soap) VRT Share: 33.2% Rating: 14.2%	<i>Thuis</i> (soap) VRT Share: 31.6% Rating: 12.4%

PRIVATE CHANNEL VTM – 33.4%

	MONDAY 25	TUESDAY 26	WEDNESDAY 27	THURSDAY 28	FRIDAY 29
19:00	<i>Familie</i> (soap) Studio's Amusement Share: 33.5% Rating: 13.6%	<i>Familie</i> (soap) Studio's Amusement Share 34.51% Rating: 14.02%	<i>Familie</i> (soap) Studio's Amusement Share 34.20% Rating: 13.29%	<i>Familie</i> (soap) Studio's Amusement Share 30.55% Rating: 12.82%	<i>Familie</i> (soap) Studio's Amusement Share 33.93% Rating: 13.08%
20:00	<i>Verschoten & zoon</i> (comedy) D&D Productions Share: 33.81% Rating: 14.76%	<i>Wie Wordt Multimiljonair</i> (game) Endemol Share 30.85% Rating: 13.48%	<i>De surprise show</i> (entertainment) Endemol Share 25.67% Rating: 10.59%	<i>Cafe Majestic</i> (comedy) RV Productions Share 28.91% Rating: 12.71%	<i>Wie Wordt Multimiljonair</i> (game) Endemol Share 30.41% Rating: 12.44%

BELGIUM

2003 (22 – 26 sept.)

PUBLIC TV TV1 (VRT) – 36.5%

	MONDAY 22	TUESDAY 23	WEDNESDAY 24	THURSDAY 25	FRIDAY 26
19:00	<i>Man Bijt Hond</i> (entertaining magazine) Woestijnvis Share: 37.4% Rating: 13%	<i>Man Bijt Hond</i> (entertaining magazine) Woestijnvis Share: 36.1% Rating: 12.3%	<i>Man Bijt Hond</i> (entertaining magazine) Woestijnvis Share: 33.7% Rating: 11%	<i>Man Bijt Hond</i> (entertaining magazine) Woestijnvis Share: 33.7% Rating: 11%	<i>Man Bijt Hond</i> (entertaining magazine) Woestijnvis Share: 34.2% Rating: 11.1%
20:00	<i>Thuis</i> (soap) VRT Share: 32.6% Rating: 12.8%	<i>Thuis</i> (soap) VRT Share: 33.4% Rating: 12.9%	<i>Thuis</i> (soap) VRT Share: 33.5% Rating: 12.5%	<i>Thuis</i> (soap) VRT Share: 33.5% Rating: 12.5%	<i>Thuis</i> (soap) VRT Share: 32.7% Rating: 12.4%

PRIVATE CHANNEL VTM – 32%

	MONDAY 22	TUESDAY 23	WEDNESDAY 24	THURSDAY 25	FRIDAY 26
19:00	<i>Familie</i> (soap) Studio's Amusement Share 36.71% Rating: 13.70%	<i>Familie</i> (soap) Studio's Amusement Share 36.09% Rating: 13.12%	<i>Familie</i> (soap) Studio's Amusement Share 39.98% Rating: 13.71%	<i>Familie</i> (soap) Studio's Amusement Share 38.74% Rating: 13.71%	<i>Familie</i> (soap) Studio's Amusement Share 36.46% Rating: 12.23%
20:00	<i>Lili en marleen</i> (comedy) RV Productions Share 38.32% Rating: 15.73%	<i>Vinger aan de poot</i> (docusoap) De Televisiefabriek Share 27.13% Rating: 10.67%	<i>Babyboom</i> (docusoap) De Televisiefabriek Share 28.00% Rating: 10.94%	<i>De zware voet</i> (docusoap) VTM Share 26.13% Rating: 10.46%	<i>De pfaafs</i> (docusoap) De Televisiefabriek Share 41.85% Rating: 15.97%

DENMARK 2000 (25 – 29 sept.)

PUBLIC CHANNEL TV 2 – 36%

	MONDAY 25	TUESDAY 26	WEDNESDAY 27	THURSDAY 28	FRIDAY 29
19:00	<i>Nyhederne</i> 19.00 (News) TV 2 Share: 53.5% Rating: 15.87%	<i>Nyhederne</i> 19.00 (News) TV2 Share: 53.53% Rating: 15.42%	<i>Nyhederne</i> 19.00 (News) TV 2 Share: 56.78% Rating: 17.09%	<i>Nyhederne</i> 19.00 (News) TV 2 Share: 51.2% Rating: 16.4%	<i>Nyhederne</i> 19.00 (News) TV 2 Share: 64.68% Rating: 18.11%
20:00	<i>Station 2</i> (documentary program helping the police in clearing crime cases) TV 2 Share: 24.21 % Rating: 11.53%	<i>Sirengt Fortroligt</i> [X-Files] (Series) USA Share: 24.39% Rating: 9.37%	<i>Det er dit valg- det sidste ord</i> (political program about EURO referendum) TV 2 Share: 24.27% Rating: 9.03%	<i>Euro-valgaften</i> (political program about EURO referendum) TV 2 Share: 49.02% Rating: 19.4%	<i>Danmark Hvad nu</i> (a political program about EURO referendum) TV 2 Share: 32.94% Rating: 12.22%

PRIVATE CHANNEL TV 3 – 13%

	MONDAY 25	TUESDAY 26	WEDNESDAY 27	THURSDAY 28	FRIDAY 29
19:00	<i>Alle Tidens Barnepige</i> [The Nanny] (comedy series) Sternin/Fraser Ink, Inc. and High School Sweethearts in association with TriStar Television, Inc. Share: 5.77% Rating: 1.74%	<i>Alle Tidens Barnepige</i> [The Nanny] ibidem Share: 5.82% Rating: 1.71%	<i>Alle Tidens Barnepige</i> [The Nanny] ibidem Share: 4.55% Rating: 1.38%	<i>Alle Tidens Barnepige</i> [The Nanny] ibidem Share: 4.03% Rating: 1.31%	<i>Alle Tidens Barnepige</i> [The Nanny] ibidem Share: 4.56% Rating: 2.19%
20:00	<i>Hvide Løgne</i> (Danish Soap) TV 3 Share: 7.9% Rating: 2.8%	<i>Hvide Løgne</i> (Danish Soap) TV 3 Share: 8.3% Rating: 2.68%	<i>Hvide Løgne</i> (Danish Soap) TV 3 Share: 8.92% Rating: 2.97%	<i>Hvide Løgne</i> (Danish Soap) TV 3 Share: 6.06% Rating: 2.19%	<i>Utroligt – men sandt</i> [Would you believe it?] (American documentary from 1997 (popular culture, about unbelievable things) Share: 2.82% Rating: 0.91

DENMARK
2003 (22 – 26 sept.)
PUBLIC CHANNEL TV 2 – 38%

	MONDAY 22	TUESDAY 23	WEDNESDAY 24	THURSDAY 25	FRIDAY 26
19:00	<i>Nyhederne</i> 19.00 (News) TV 2 Share: 61.25% Rating: 17.92%	<i>Nyhederne</i> 19.00 (News) TV2 Share: 59.38% Rating: 18.75%	<i>Nyhederne</i> 19.00 (News) TV 2 Share: 42.95% Rating: 14.02%	<i>Nyhederne</i> 19.00 (News) TV 2 Share: 59.13% Rating: 17.96%	<i>Nyhederne</i> 19.00 (News) TV 2 Share: 55.82% Rating: 15.77%
20:00	<i>Hvem vil være millionær?</i> [Who wants to be a millionaire?] (Quiz program) Metronome productions A/S Share: 46.56 % Rating: 19.61%	<i>Popstars rivals</i> (Popular music show) Metronome Productions A/S Share: 22.57% Rating: 8.98%	<i>Forsvar</i> (Danish criminal TV series) Nordisk film Share: 45.5% Rating: 17.96%	<i>Livet er Fedt</i> (Actual program) TV2 Share: 55.74% Rating: 22.04%	<i>Finer han kanten - niels hausgaard show 2003</i> (Stand up comedy) Paseofilm ApS Share: 40.79% Rating: 16.07%

PRIVATE CHANNEL TV 3 – 11%

	MONDAY 22	TUESDAY 23	WEDNESDAY 24	THURSDAY 25	FRIDAY 26
19:00	<i>Alle Elsker Raymond</i> [Everybody Loves Raymond] (sitcom series) CBS Share: 3.15% Rating: 0.93%	<i>Alle Elsker Raymond</i> [Everybody Loves Raymond] (sitcom series) CBS Share: 2.52% Rating: 0.8%	<i>Alle Elsker Raymond</i> [Everybody Loves Raymond] (sitcom series) CBS Share: 2.8% Rating: 0.9%	<i>Alle Elsker Raymond</i> [Everybody Loves Raymond] (sitcom series) CBS Share: 2.05% Rating: 0.61%	<i>Alle Elsker Raymond</i> [Everybody Loves Raymond] (sitcom series) CBS Share: 2.56% Rating: 0.73%
20:00	<i>Sex and the City</i> (soap) HBO Share: 4.35% Rating: 1.44%	<i>Sex and the City</i> (soap) HBO Share: 2.8% Rating: 0.96%	<i>Sex and the City</i> (soap) HBO Share: 4.55% Rating: 1.52%	<i>Sex and the City</i> (soap) HBO Share: 3.16% Rating: 1.09%	<i>Sex and the City</i> (soap) HBO Share: 2.32% Rating: 0.74%

FINLAND

2000 (25 – 29 sept.)

PUBLIC CHANNEL YLE 1 – 22.6%

	MONDAY 25	TUESDAY 26	WEDNESDAY 27	THURSDAY 28	FRIDAY 29
19:00	<i>Sydney 2000</i> (Sydney Olympic Games 2000) (sport) YLE & international co-operation Share Rating: Not rated				
20:00					

PRIVATE CHANNEL MTV 3 – 40.4%

	MONDAY 25	TUESDAY 26	WEDNESDAY 27	THURSDAY 28	FRIDAY 29
19:00	<i>7 o'clock news</i> (News) MTV3 own news production				
20:00	<i>Parhaat vuodet</i> [Best years] (Finnish drama) Spede-yhtiöt	<i>Hei, olen Susan</i> [Suddenly Susan] (American comedy) Warner Bros. Television	<i>45 minuuttia</i> [45 minutes] (Current affairs) MTV3 own news production	<i>Kokkisota</i> [Cook war] (Finnish kitchen program that is based on British Ready Steady Cook format) Broadcasters Oy	<i>Napakymppi</i> [The Dating Game] (Finnish dating program based in the The Dating Game format)

Rating and share data not available.

FINLAND

2003 (22 – 26 sept.)

PUBLIC CHANNEL YLE 1 – 23%

	MONDAY 22	TUESDAY 23	WEDNESDAY 24	THURSDAY 25	FRIDAY 26
19:00	<i>Uutisuoto</i> [News leak] Entertainment Broadcasters Oy and YLE	<i>Prisma:</i> <i>Superkärpänen</i> [Prisma: Superfly] (Foreign non-fiction/ information) Oxford Film and Television	<i>Ulkolinja:</i> <i>Ammutaanhan</i> <i>liberaalejakin</i> [Out line] (Documentary) YLE's own production	<i>A-Studio Atlas</i> [Atlas of the A- studio] Current affairs YLE's own production	<i>Top 40</i> [Finnish Top 40 chart show] (Music) YLE's own production
20:00	<i>MOT</i> [What had to be investigated] (Non-fiction/ information) YLE's own production	<i>Tosi tarina:</i> <i>Strutsijengi</i> [True story: Ostrich gang] Documentary YLE's own production	<i>Antiikkia,</i> <i>antiikkia</i> [Antique, antique] (Non-fiction/ information) Tarinatalo Oy and YLE	<i>A-Studio</i> <i>Atlas</i> [Atlas of the A-studio] (Current affairs) YLE's own production	<i>Maaailman</i> <i>ympäri</i> [Round-the- world] Entertainment Broadcasters Oy and YLE

PRIVATE CHANNEL MTV 3 – 39.1%

	MONDAY 22	TUESDAY 23	WEDNESDAY 24	THURSDAY 25	FRIDAY 26
19:00	<i>7 o'clock news</i> (News) MTV3 own news production Rating: 15.7 %	<i>7 o'clock news</i> (News) MTV3 own news production Rating: 15.7 %	<i>7 o'clock news</i> (News) MTV3 own news production Rating: 15.7 %	<i>7 o'clock news</i> (News) MTV3 own news production Rating: 15.7 %	<i>7 o'clock news</i> (News) MTV3 own news production Rating: 15.7 %
20:00	<i>Kuumia aaltoja</i> [Hot flashes] (Finnish drama comedy) Spede-tuotanto Rating: 18 %	<i>Will & Grace</i> (American comedy) KoMut Entertainment in association with NBC Studios and Three Sisters Entertainment. Rating: 8 %	<i>45 minuuttia</i> [45 minutes] (Current affairs) MTV3 own news production Rating: 15.81 %	<i>Kokkisota</i> [Cook war] (Finnish kitchen program that is based on British <i>Ready Steady Cook</i> format) Broadcasters Oy Rating: 11.75 %	<i>Idols</i> (Finnish entertainment program that is based on Fremantle Media) Fremantle entertainment Oy Rating: 18 %

Share data not available.

FRANCE

2000 (25 – 29 sept.)

PUBLIC CHANNEL France 2 – 22.1%

	MONDAY 25	TUESDAY 26	WEDNESDAY 27	THURSDAY 28	FRIDAY 29
19:00	<i>Qui mange qui?</i> (téléfilm) Alya Studio Expand Share: 17.4 % Rating: 7.8 %	<i>Le client</i> (film) Arnon Milchan, Steven Reuther, Mary McLaglen Share: 17.3 % Rating: 7.9 %	<i>L'instit</i> (serie) Hamster / JLA Share: 30.5 % Rating: 12.4 %	<i>Envoyé spécial</i> (magazine) France 2 Share: 21 % Rating: 8.3 %	<i>P.J.</i> (serie) Tel France / Ftvi Share: 28.3 % Rating: 12.5 %
20:00	<i>Argent public, argent privée</i> (magazine) Sylvain ATTAL Share: 13.8 % Rating : 2.1 %	<i>Alors heureux ?</i> (magazine) France 2 Share: 15.9 % Rating: 1.7 %	<i>Ca se discute</i> (magazine) Réservoir Prod Share: 42 % Rating: 6.3 %	<i>Flirter avec les embrouilles</i> (film) David O. Russell Share: 11.5 % Rating: 1.1 %	<i>Avocats et associés</i> (serie) Son et lumière / France 2 Share: 26.7 % Rating: 9.9 %

PRIVATE CHANNEL TF 1 – 33.4%

	MONDAY 25	TUESDAY 26	WEDNESDAY 27	THURSDAY 28	FRIDAY 29
19:00	<i>Les Misérables</i> (4/4) (teletfilm) GMT Share: 26.9 % Rating: 11.8 %	<i>Taxi</i> (film) Luc Besson Share: 47.3 % Rating: 22.8 %	<i>Football</i> (coupe d'europe) (sport) Share: 26.8 % Rating: 10.8 %	<i>Julie Lescaut</i> (serie) GMT Share: 47.4 % Rating: 20.7 %	<i>Le grand soir</i> (entertainment) Glem Share: 21.7 % Rating: 8.1 %
20:00	<i>Ya pas photo !</i> (emision) Lauribel Share: 41.3 % Rating: 6.2 %	<i>Ciel mon mardi</i> (emision) Coyote production Share: 38.4% Rating: 4.8 %	<i>Football</i> (coupe d'europe) (sport) Share: 24.3 % Rating: 3.3 %	<i>La captive</i> (teletfilm) Paulo Branco Share: 30.9 % Rating: 4.3 %	<i>Sans aucun doute</i> (entertainment) Quai Sud Share: 41.7 % Rating: 4.3 %

FRANCE

2003 (22 – 26 sept.)

PUBLIC CHANNEL France 2 – 20.8%

	MONDAY 22	TUESDAY 23	WEDNESDAY 24	THURSDAY 25	FRIDAY 26
19:00	<i>Retour aux sources</i> (telefilm) Expandrama, Alia/ Rtbf Share: 23.2 % Rating: 10.2 %	<i>Hook ou la revanche du capitaine crochet</i> (film) Steven Spielberg Share: 21.1 % Rating: 7.9 %	<i>Le monde de Yo Yo</i> (telefilm) Images et compagnies/les films de la boissière Share: 23.5 % Rating: 9.9 %	<i>100 minutes pour convaincre</i> /José Bové (émission politique) France 2 Share: 16.1 % Rating: 6 %	<i>La crim'</i> (serie) France2 / Fit production Share: 27.3 % Rating: 11.4 %
20:00	<i>Complément d'enquête</i> (magazine) France 2 Share: 23.6 % Rating: 3.7 %	<i>L'ombre blanche</i> (film) Warner Bros/ Seagal / Nasso prod. Share: 22.6 % Rating: 1.9 %	<i>Ca se discute</i> (magazine) Réservoir Prod Share: 37 % Rating: 5.4 %	<i>Double "Je"</i> (magazine) France2 / Equipage / TV5 / RFO Share: 27.3 % Rating: 1.2 %	<i>Avocats et associés</i> (serie) France 2 / Son et Lumière Share: 16.3 % Rating: 3.1 %

PRIVATE CHANNEL TF 1 – 32.7%

	MONDAY 22	TUESDAY 23	WEDNESDAY 24	THURSDAY 25	FRIDAY 26
19:00	<i>Le grand patron</i> (fiction) GMT Productions Share: 26.9 % Rating: 11.8 %	<i>Le mariage de mon meilleur ami</i> (film) TriStar Pictures, U.S.A. Share: 38 % Rating: 15.7 %	<i>Ushuaïa Nature</i> (magazine) Studio 107 Share: 31.6 % Rating: 13.1 %	<i>Les cordiers juges et flics</i> (serie) Tel france Share: 44.4 % Rating: 18.7 %	<i>Les 7 péchés capitaux</i> (magazine) Quai Sud Share: 30.7 % Rating: 11.3 %
20:00	<i>Scrupules «Agir sans scrupules au nom de l'amour»</i> (magazine) Réservoir Prod Share: 21.3 % Rating: 3.4 %	<i>Confession intime</i> (magazine) Quai Sud Share: 37.7 % Rating: 4.6 %	<i>Colombo</i> (serie) Christopher Seiter Share : 28 % Rating: 4.6 %	<i>La methode Cauet</i> (magazine) Lauribel / Be aware Share: 25.2 % Rating: 3.7 %	<i>C'est quoi l'amour</i> (magazine) Isoète Production Share: 27.3 % Rating: 3.6 %

GERMANY

2003 (8 – 12 sept.)

PUBLIC CHANNEL ARD – 14%

	MONDAY 8	TUESDAY 9	WEDNESDAY 10	THURSDAY 11	FRIDAY 12
20:15	<i>Die Kommissarin</i> (tv-series) ARD/Monaco Film GmbH Share: 22.8% N° viewers: 6.340.000	<i>Adelheid und ihre Mörder</i> (tv-series) Ndf GmbH Share: 20.2% N° viewers: 5.750.000	<i>Fútbol:</i> Germy vs.Scotland (sports) ARD Share: 48.8% N° viewers: 15.190.000	<i>Panorama</i> (information- magazine) ARD Share: 14.2% N° viewers: 4.120.000	<i>Das bischen Haushlt</i> (tv-movie) ARD Share: 15.6% N° viewers: 4.340.000
21:00	<i>Report</i> (information- magazine) ARD Share: 13% N° viewers: 3.910.000	<i>In aller Freundschaft</i> (tv-series) Saxonia Media Filmproduktion GmbH Share: 16.4% N° viewers: 4.670.000		<i>Tartot</i> (tv-movie) ARD Share: 13.7% N° viewers: 3.650.000	<i>ARD exklusiv</i> (information- documentary) ARD Share: 10.2% N° viewers: 2.800.000

Prime time starts at 20:00. ARD starts with its daily news programm *Tagesschau* (20.00 pm to 20.15 pm). Instead of rating German consultant gave number of viewers.

PRIVATE CHANNEL RTL – 15.4%

	MONDAY 8	TUESDAY 9	WEDNESDAY 10	THURSDAY 11	FRIDAY 12
20:15	<i>Die ultimative Chart Show</i> (light entertain- ment) RTL Share: 21% N° viewers: 5.480.000	<i>Milenium Man</i> (tv-series) US (Paramount) Share: 10.7% N° viewers: 3.030.000	<i>Deutschland sucht den Superstar</i> (light entertain- ment) RTL Share: 17% N° viewers: 5.360.000	<i>Alarm für Cobra 11</i> (tv-movie) RTL Share: 21.6% N° viewers: 6.130.000	<i>Wer wird Millionär?</i> (light entertain.) RTL Share: 27.9% N° viewers: 8.120.000
21:00		<i>Im Namen des Gesetzes</i> (tv-series) RTL Share: 14.5% N° viewers: 4.000.000	<i>Die DDR-Show</i> (light entertain- ment) Share: 12.5% N° viewers: 3.950.000		<i>Mein Leben & ich-Ritas Welt</i> (comedy) RTL Share: 15.4% N° viewers: 4.480.000

RTL broadcasts a daily soap *Gute Zeiten schlechte Zeiten* from 19.30 to 20.15.

GREECE

2000 (11 – 15 sept.)

PUBLIC CHANNEL ET1 – 12%

	MONDAY 11	TUESDAY 12	WEDNESDAY 13	THURSDAY 14	FRIDAY 15
21:00	<i>San Adelphes</i> (serie) Studio ATA Share: 5.4% Rating: 1.5%	<i>To mikro spiti stoPagkrati</i> (serie) Studio ATA Share: 6.1% Rating: 1.7%	<i>Olympic Games 2000</i> (football) Share: 6.6% Rating: 1.7%	<i>Olympic Games 2000</i> (football) Share: 5.4% Rating: 1.4%	<i>Olympic Games Ceremony</i> Share: 13.4% Rating: 3%
22:00	<i>Robetiko</i> (serie) G.Zerboulakos -Greek Cinema Centre-K.Feris Share: 4.8% Rating: 1.5%	<i>Chameni Anoiaksi</i> (serie) Theasi Share: 3% Rating: 1%	<i>To synergeio</i> (serie) Pantas TV Share: 1.7% Rating: 0.5%	<i>San Adelphes</i> (serie) Studio ATA Share: 5.2% Rating: 1.5%	

PRIVATE CHANNEL ANTI – 21.8%

	MONDAY 11	TUESDAY 12	WEDNESDAY 13	THURSDAY 14	FRIDAY 15
21:00	<i>Konstantinou Kai Elenis</i> (serie) Epsilon Share: 33.8% Rating: 9.8%	<i>Konstantinou Kai Elenis</i> (serie) Epsilon Share: 28.5% Rating: 9.2%	<i>Konstantinou Kai Elenis</i> (serie) Epsilon Share: 27.2% Rating: 9.2%	<i>Konstantinou Kai Elenis</i> (serie) Epsilon Share: 28.3% Rating: 7.6%	<i>Konstantinou Kai Elenis</i> (serie) Epsilon Share: 31.1% Rating: 8.2%
22:00	<i>Eglimata</i> (serie) Ena Production Share: 33.5% Rating: 10.1%	<i>Eglimata</i> (serie) Ena Production Share: 25% Rating: 8.5%	<i>Eglimata</i> (serie) Ena Production Share: 23.6% Rating: 8.5%	<i>Eglimata</i> (serie) Ena Production Share: 29.4% Rating: 9.1%	<i>Eglimata</i> (serie) Ena Production Share: 31% Rating: 9%

GREECE

2002 (9 – 13 sept.)

PUBLIC CHANNEL ET1 – 14%

	MONDAY 9	TUESDAY 10	WEDNESDAY 11	THURSDAY 12	FRIDAY 13
21:00	<i>Argentina vs. Yugoslavia</i> (basket) Share: 3.4% Rating: 0.9%	<i>I agapi argisia mera</i> (serie) G.Koutsomitis Share: 5.4% Rating: 1.6%	<i>Ground Zero 1. Memory time</i> (tribute) Share: 2.8% Rating: 0.9%	<i>Ta ftera tou erota</i> (serie) Profit Share: 6.7% Rating: 1.9%	<i>Ta ftera tou erota</i> (serie) Profit Share: 5% Rating: 1.2%
22:00	<i>Yugoslavia</i> (basket) Share: 3.2% Rating: 0.9%	<i>Ystera irthan oi melisses</i> (serie) Profit Share: 3.3% Rating: 1.1%		<i>The ship of the outlaws</i> (film) Share: 3.3% Rating: 1.1%	<i>San palio cinema</i> Distrib.: CBS Share: 3.8% Rating: 1%

PRIVATE CHANNEL ANTI1 – 23.1%

	MONDAY 9	TUESDAY 10	WEDNESDAY 11	THURSDAY 12	FRIDAY 13
21:00	<i>Vodka portokali</i> (serie) Studio ATA Share: 17.8% Rating: 5.1%	<i>Vodka portokali</i> (serie) Studio ATA Share: 15.8% Rating: 5.8%	<i>Konstantinou Kai Elenis</i> (serie) Epsilon Share: 20.1% Rating: 6.2%	<i>Konstantinou Kai Elenis</i> (serie) Epsilon Share: 21% Rating: 6.7%	<i>Konstantinou Kai Elenis</i> (serie) Epsilon Share: 20.9% Rating: 6.1%
22:00	<i>Eglimata</i> (serie) Ena Production Share: 20.7% Rating: 6.7%	<i>Eglimata</i> (serie) Ena Production Share: 21.5% Rating: 7.3%	<i>Eglimata</i> (serie) Ena Production Share: 19.9% Rating: 6.5%	<i>Eglimata</i> (serie) Ena Production Share: 21.6% Rating: 7.5%	<i>Eglimata</i> (serie) Ena Production Share: 21% Rating: 6.9%

IRELAND

2000 (18 – 22 sept.)

PUBLIC CHANNEL RTE 1 – 25.4%

	MONDAY 18	TUESDAY 19	WEDNESDAY 20	THURSDAY 21	FRIDAY 22
20:00	<i>Reeling in the Years</i> (nostalgic current affairs/music show) RTE Television Share: 27.1% Rating: 9.5%	<i>Fair City</i> (soap opera) RTE Television Share: 35.8% Rating: 12.8%	<i>Fair City</i> (soap opera) RTE Television Share: 43.3% Rating: 15.4%	<i>Fair City</i> (soap opera) RTE Television Share: 11.8% Rating: 34.3%	<i>About the House</i> (DIY Show) Earth Horizon Productions Share: 34.5% Rating: 11%
20:30	<i>Ear to the Ground</i> (agricultural magazine show) RTE Television Share: 26.6 % Rating: 9.7 %	<i>O'Gorman's People</i> (social awareness/vox pop programme) RTE Television Share: 29.2 % Rating: 10.6 %	<i>Best of Beyond the Hall Door Home</i> (decorating/Makeover programme) RTE Television Share: 32.0 % Rating: 11.0 %	<i>Garden Heaven</i> (gardening show) RTE Television Share: 21.2 % Rating: 7.8 %	<i>As Time Goes By</i> (British comedy series) BBC Television Share: 26.5 % Rating: 8.4 %

PRIVATE CHANNEL TV 3 – 8.00%

	MONDAY 18	TUESDAY 19	WEDNESDAY 20	THURSDAY 21	FRIDAY 22
20:00	<i>Eastenders</i> (UK soap opera) BBC Television Share: 10.0 % Rating: 3.7 %	<i>Champions League Soccer</i>	<i>Champions League Soccer</i>	<i>Buffy the Vampire Slayer</i> (US drama) 20th Century Fox Television Share: 13.0 % Rating: 4.0 %	<i>Charmed</i> (comedy drama) Spelling Television (US) Share: 9.0 % Rating: 2.8 %
21:00	<i>Champagne Lifestyles</i> (infotainment) US Origin – Producer Unknown Share: 8.0 % Rating: 2.9 %	TV3 Television Share: 18.0 % Rating: 6.4 %	TV3 Television Share: 9.0 % Rating: 3.1 %	<i>Angel</i> (US drama) 20th Century Fox Television Share: 10.0 % Rating: 3.6 %	<i>Surviving the Moment of Impact 1</i> (reality show) Fox Television Share: 15 % Rating: 4.9 %

IRELAND

2003 (15 – 19 sept.)

PUBLIC CHANNEL RTE 1 – 24.1%

	MONDAY 15	TUESDAY 16	WEDNESDAY 17	THURSDAY 18	FRIDAY 19
20:00	<i>EastEnders</i> (soap opera) BBC Share: 36% Rating: 10.4%	<i>Fair City</i> (soap opera) RTE TV Share: 38% Rating: 11.3%	<i>Fair City</i> (soap opera) RTE TV Share: 37% Rating: 11.9%	<i>Fair City</i> (soap opera) RTE TV Share: 48% Rating: 14.7%	<i>EastEnders</i> (soap Opera) BBC Share: 36% Rating: 10.8%
21:00	<i>All Kinds of Everything</i> (quiz show) RTE TV Share: 13% Rating: 4.3%	<i>About the House</i> (DIY programme) Earth Horizon Productions Share: 29% Rating: 9.5%	<i>Off the Rails</i> (fashion show) RTE TV Share: 29% Rating: 9.1%	<i>Only Fools and Horses</i> (comedy) BBC Share: 33% Rating: 18.8%	<i>Fair City</i> (soap opera) RTE TV Share: 40% Rating: 12.5%

PRIVATE CHANNEL TV 3 – 10.7%

	MONDAY 15	TUESDAY 16	WEDNESDAY 17	THURSDAY 18	FRIDAY 19
20:00	<i>Malcolm in the Middle</i> (comedy) 20th century Fox Television Share: 16.5% Rating: 4.7%	<i>Champions League</i> (soccer) TV3 Television Share: 15.9% Rating: 5.1%	<i>Judging Amy</i> (drama) Barbar Hall/ Joseph Stern Productions. in association with CBS Productions and Twentieth Century Fow Television Share: 6.6% Rating: 2.1%	<i>Buffy the Vampire Slayer</i> (drama) 20th Century Fox Television Share: 3.3% Rating: 1%	<i>All Saints</i> (drama) Channel 7 Share: 10.7% Rating: 3.3%
21:00	<i>Coronation Street</i> (soap opera) Granada Television Share: 44.3% Rating: 14.5%		<i>Little Man Tate</i> (film) Orion Pictures Share: 10.7% Rating: 3.2%	<i>Footballers Wives</i> (drama) Shed Productions Share: 7.2% Rating: 2.5%	<i>The dunphy</i> show (chat show) DC Productions Share: 12% Rating: 4.2%

ITALY

2000 (18 – 22 sept.)

PUBLIC CHANNEL RAI 1 – 22.82 %

	MONDAY 18	TUESDAY 19	WEDNESDAY 20	THURSDAY 21	FRIDAY 22
20:30	<i>La Zingara</i> (quiz) RAI Share: 21.50 % Rating: 10.25 %	<i>La Zingara</i> (quiz) RAI Share: 20.11 % Rating: 9.34 %	<i>La Zingara</i> (quiz) RAI Share: 21.76 % Rating: 10.43 %	<i>La Zingara</i> (quiz) RAI Share: 19.63 % Rating: 9.30 %	<i>La Zingara</i> (quiz) RAI Share: 23.47 % Rating: 10.61 %
21:30	<i>Piovuto dal cielo</i> (part II & III) (TV movie) Publisteri/RAI Share: 29.74 % Rating: 14.34 %	<i>Incantesimo</i> (serie) RAI Fiction Share: 21.22 % Rating: 10.11 %	<i>Un verdetto difficile</i> (tit. or.: Defenders: The Payback. Andy Wolk. USA 1997) (TV movie) Paramount Network Television Productions Share: 23.15 % Rating: 10.75 %	<i>Fantastica Italiana 2000</i> (variety) RAI Share: 19.12 % Rating: 8.39 %	<i>Il commissario Rex... e tutto ricomincia</i> (serie) Mungo-Film/Sat.1/Österreichischer Rundfunk (ORF). Share: 27.23 % Rating: 12.56 %

PRIVATE CHANNEL Canale 5 – 21.22 %

	MONDAY 18	TUESDAY 19	WEDNESDAY 20	THURSDAY 21	FRIDAY 22
20:30	<i>Estatissima Sprint</i> (magazine) Mediaset Share: 19.77 % Rating: 9.55 %	<i>Estatissima Sprint</i> (magazine) Mediaset Share: 20.01 % Rating: 9.41 %	<i>Estatissima Sprint</i> (magazine) Mediaset Share: 17.00 % Rating: 7.95 %	<i>Champions League: Lazio – Sparta Praga</i> (sport) Mediaset Share: 20.12 % Rating: 9.27 %	<i>Estatissima Sprint</i> (magazine) Mediaset Share: 18.84 % Rating: 8.59 %
21:00	<i>I Misserabili</i> (III) (mini serie) DD productions [fr]. Fox Family Channel [us] G.M.T. Productions [fr]. Mediaset [it]. Sat.1 [de]. TF1 [fr] Taurus Film [de] Share: 21.52 % Rating: 10.13 %	<i>I Misserabili</i> (IV) (mini serie) Producer: vid. monday Share: 23.14 % Rating: 10.96 %	<i>Champions League: Lazio – Sparta Praga</i> (sport) Mediaset Share: 20.12 % Rating: 9.27 %	<i>Grande Fratello</i> (reality show) Aran Endemol Share: 28.98 % Rating: 13.41 %	<i>Chi vuol essere miliardario?</i> (quiz) Aran Endemol Share: 25.08 % Rating: 11.44 %

ITALY

2003 (22 – 26 sept.)

PUBLIC CHANNEL RAI 1 – 23.75%

	MONDAY 22	TUESDAY 23	WEDNESDAY 24	THURSDAY 25	FRIDAY 26
20:30	<i>I grandi comici</i> (magazine) RAI Share: 15.09 % Rating: 7.40 %	<i>I grandi comici</i> (magazine) RAI Share: 15.89 % Rating: 7.79 %	<i>I grandi comici</i> (magazine) RAI Share: 15.41 % Rating: 7.64 %	<i>I grandi comici</i> (magazine) RAI Share: 16.42 % Rating: 8.02 %	<i>I grandi comici</i> (magazine) RAI Share: 17.85 % Rating: 8.37 %
21:30	<i>Salvo d'Acquisto</i> (II) (mini-serie) RAI Fiction/Sacha Film Company Share: 27.13 % Rating: 13.41 %	<i>Scommettiamo che...?</i> (varietà) RAI Share: 19.97 % Rating: 9.40 %	<i>Punto e a capo</i> (reality show) RAI Share: 13.55 % Rating: 5.96 %	<i>I raccomandati</i> (varietà) RAI Share: 24.10 % Rating: 10.51 %	<i>Un papà quasi perfetto</i> (serie) RAI Fiction/ Clemi Cinematografia Share: 17.66 % Rating: 8.30 %

Number Five

146

June 2004

PRIVATE CHANNEL Canale 5 – 22.58%

	MONDAY 22	TUESDAY 23	WEDNESDAY 24	THURSDAY 25	FRIDAY 26
20:30	<i>Striscia la notizia – La voce della renitenza</i> (humor news) Mediaset Share: 40.25 % Rating: 20.33 %	<i>Striscia la notizia – La voce della renitenza</i> (humor news) Mediaset Share: 38.25 % Rating: 18.63 %	<i>Striscia la notizia – La voce della renitenza</i> (humor news) Mediaset Share: 36.80 % Rating: 18.08 %	<i>Striscia la notizia – La voce della renitenza</i> (humor news) Mediaset Share: 35.81 % Rating: 17.54 %	<i>Striscia la notizia – La voce della renitenza</i> (humor news) Mediaset Share: 35.50 % Rating: 16.54 %
21:30	<i>Cast away</i> (film) 20th Century Fox Share: 29.01 % Rating: 12.09 %	<i>Distretto di Polizia</i> (serie) Mediaset Share: 22.57 % Rating: 11.61 %	<i>Il Bello delle Donne</i> (serie) RTI Share: 20.31 % Rating: 9.54 %	<i>Il Bello delle Donne</i> (serie) RTI Share: 21.47 % Rating: 9.65 %	<i>Scherzi a parte</i> (reality show, humor) Mediaset Share: 32.04 % Rating: 14.06 %

N THERLANDS
2000 (11 – 15 sept.)
PUBLIC CHANNEL Nederland 2 – 17.4%

	MONDAY 11	TUESDAY 12	WEDNESDAY 13	THURSDAY 14	FRIDAY 15
20:00	<i>Body Check</i> (game) Rene Stokvis Producties Share: 5.9% Rating: 2%	<i>Radar</i> (light information) TROS Share: 16.6% Rating: 2.2%	SPORT	SPORT	<i>Het Gouden TeleVisier-Gala</i> (entertainment) Endemol Netherlans Share: 23.3% Rating: 8.8%
21:00	<i>Man/Vrouw</i> (talkshow) Evangelische Omroep Share: 5.7% Rating: 2.2%	SPORT			

PRIVATE CHANNEL RTL 4 – 14.9%

	MONDAY 11	TUESDAY 12	WEDNESDAY 13	THURSDAY 14	FRIDAY 15
20:00	<i>Goede tijden, slechte tijden</i> (soap) Endemol Entertainment/ Grundy/Joop van den Ende TV producties Share: 31.6% Rating: 10.7%	<i>Goede tijden, slechte tijden</i> (soap) Endemol Entertainment/ Grundy/Joop van den Ende TV producties Share: 28% Rating: 9.8%	<i>Goede tijden, slechte tijden</i> (soap) Endemol Entertainment/ Grundy/Joop van den Ende TV producties Share: 29.8% Rating: 10.3%	<i>Goede tijden, slechte tijden</i> (soap) Endemol Entertainment/ Grundy/Joop van den Ende TV producties Share: 27% Rating: 9%	<i>Goede tijden, slechte tijden</i> (soap) Endemol Entertainment/ Grundy/Joop van den Ende TV producties Share: 25.4% Rating: 8.8%
21:00	<i>Chicago Hope</i> (TV series) 20th century Fox/David E. Kelly Productions Share: 9.8% Rating: 3.8%	<i>Diamons I</i> (tv-miniserie) Filmfonds Vlaanderen. Independent Productions Share: 8.5% Rating: 2.9%	<i>Diamons II</i> (tv-miniserie) Filmfonds Vlaanderen. Independent Productions Share: 5.8% Rating: 2.2%	<i>Diamons III</i> (tv-miniserie) Filmfonds Vlaanderen. Independent Productions Share: 5% Rating: 1.9%	<i>The three musketeers</i> (movie)Caravan Pictures/ One for all pro- ductions/Vienna Film Financing Fund/Walt Disney Pictures/Wolfga ng Odelga Filmproduction Share: 14.2% Rating: 5.4%

There are no hourly programmes. The two-hour prime time period is from 20.00-22.00 hours. The expert selects the first programme that starts between 19.55 and 20.55 and the first programme that starts between 20.55 and 21.30 hours as first and second prime time programme. If no programme starts between 19.55 and 20.55, he took the programme that runs at 20.30 (and starts earlier than 19.55). If no programme starts between 20.55 and 21.30, he took the programme that runs at 21.30 (and starts earlier than 20.55).

NETHERLANDS

2002 (9 – 13 sept.)

PUBLIC CHANNEL Nederland 2 – 17.0%

	MONDAY 9	TUESDAY 10	WEDNESDAY 11	THURSDAY 12	FRIDAY 13
20:00	<i>The young ones</i> (comedy) BBC Share: 5.1% Rating: 1.9%	<i>Cosby Kids</i> (entertainment) CBS/Nickelodeon/TNT Share: 4.9% Rating: 1.7%	<i>Cheers</i> (comedy) Charles Burrows Productions/ Paramount Share: 2.8% Rating: 1%	<i>Aida</i> (Information/ entertainment) — Share: 4.2% Rating: 1.3%	<i>BZN ontmoet</i> (music) Ivo Niehe producties Share: 6.5% Rating: 2%
21:00	<i>BNN at work</i> (Information/ entertainment) BNN Share: 6.4% Rating: 2.5%	<i>Siska</i> (detective) ZDF Share: 17.3% Rating: 6.5%	<i>Close-up</i> (documentary) Varies Share: 5% Rating: 1.9%	<i>Jong</i> (talkshow) Sky High producties Share: 6.9% Rating: 2.4%	<i>TV Show</i> (talkshow) Ivo Niehe producties Share: 18% Rating: 6.8%

PRIVATE CHANNEL RTL 4 – 17.1%

	MONDAY 9	TUESDAY 10	WEDNESDAY 11	THURSDAY 12	FRIDAY 13
20:00	<i>Goede tijden. slechte tijden</i> (soap) Endemol Entertainment/ Grundy/Joop van den Ende TV producties Share: 29.9% Rating: 11.1%	<i>Goede tijden. slechte tijden</i> (soap) Endemol Entertainment/ Grundy/Joop van den Ende TV producties Share: 28.8% Rating: 10.2%	<i>Goede tijden. slechte tijden</i> (soap) Endemol Entertainment/ Grundy/Joop van den Ende TV producties Share: 29.8% Rating: 10.8%	<i>Goede tijden. slechte tijden</i> (soap) Endemol Entertainment/ Grundy/Joop van den Ende TV producties Share: 26.4% Rating: 8.7%	<i>Goede tijden. slechte tijden</i> (soap) Endemol Entertainment/ Grundy/Joop van den Ende TV producties Share: 29.9% Rating: 9.4%
21:00	<i>Over de balk</i> (light information) 625 TV producties Share: 13.3% Rating: 5.3%	<i>TV makelaar</i> (light information) Endemol Nederland Share: 14.1% Rating: 5.2%	<i>11 september</i> (World Trade Centre) (documentary) Foreign prod. Share: 32.6% Rating: 12.4%	<i>Adré van Duin op zijn best</i> (comedy) Endemol Share: 18.5% Rating: 6.5%	<i>De zwakste schakel</i> (games) Holland Media House Share: 11.9% Rating: 4.6%

PORTUGAL

2000 (11 – 15 sept.)

PUBLIC CHANNEL RTP1 – 28.5%

	MONDAY 11	TUESDAY 12	WEDNESDAY 13	THURSDAY 14	FRIDAY 15
19:30	<i>Mr. Bean</i> (RTP 1) (comedy) Tin Tin & Bevan Share: n.a. Rating: 11.6%	<i>A Mentira</i> (RTP1) (film) Producer: n.a. Share: n.a. Rating: 6.1%	<i>Mr. Bean</i> (RTP 1) (comedy) Tin Tin & Bevan Share: n.a. Rating: 7.0%	<i>Mr. Bean</i> (RTP 1) (comedy) Tin Tin & Bevan Share: n.a. Rating: 9.9%	n.a.
21:00	<i>Riscos</i> (RTP 2) (serie juvenil) não informado Share: n.a. Rating: 1.8%	<i>Cidade Louca</i> (RTP 2) (film) Producer: n.a. Share: n.a. Rating: 2.2%	<i>A Mentira</i> (RTP 2) (film) Producer: Share: n.a. Rating: 4.9%	<i>Os Simpsons</i> (RTP 2) Comedy Animated 20 th Century Fox Share: n.a. Rating: 2.5%	n.a.

*Share: not available.

PRIVATE CHANNEL SIC – 48.1%

	MONDAY 11	TUESDAY 12	WEDNESDAY 13	THURSDAY 14	FRIDAY 15
21:00	<i>A Febre do Dinheiro</i> (TV contest) Pearson Share: n.a. Rating: 18.5%	<i>A Febre do Dinheiro</i> (TV contest) Pearson Share: n.a. Rating: 17.6%	<i>A Febre do Dinheiro</i> (TV contest) Pearson Share: n.a. Rating: 19.7%	<i>Laços de Família</i> (soap opera) Central Globo de Produções (Brasil) Share: n.a. Rating: 18.3%	n.a.
22:00	<i>Laços de Família</i> (soap opera) Central Globo de Produções (Brasil) Share: n.a. Rating: 18.3%	<i>Big Brother</i> (reality show) Endemol Share: n.a. Rating: 16.9%	<i>A Febre do Dinheiro</i> (TV contest) Pearson Share: n.a. Rating: 19.7%	<i>A Febre do Dinheiro</i> (TV contest) Pearson Share: n.a. Rating: 15.8%	n.a.

PORTUGAL

2003 (8 – 12 sept.)

PUBLIC CHANNEL RTP1 – 23.6%

	MONDAY 8	TUESDAY 9	WEDNESDAY 10	THURSDAY 11	FRIDAY 12
19:30	<i>Passo a Palavra</i> (tv-contest) D&D Rating: 7.9%	<i>O Preço Certo</i> <i>Em Euros</i> (tv-contest) Fremantale Media Rating: n.a.	<i>As Lições do</i> <i>Tonecas</i> (comedy) D&D Rating: 6.8%	<i>Passo a Palavra</i> (tv-contest) D&D Rating: 7.2%	<i>As Lições do</i> <i>Tonecas</i> (comedy) D&D Rating: 7.9%
21:00	<i>O Preço Certo</i> <i>Em Euros</i> (tv-contest) Fremantale Media Rating: 7.5%	“RTP Cinema” <i>Net/A Rede</i> (film) Rating: 3.7%	<i>Passo a Palavra</i> (tv-contest) D&D Rating: 5.2%	<i>O Preço Certo</i> <i>Em Euros</i> (tv-contest) Fremantle Media Rating: 6%	<i>O Preço Certo</i> <i>Em Euros</i> (tv-contest) Fremantale Media Rating: 6%

*Share: not available. News are at 20:00.

PRIVATE CHANNEL SIC – 35.3%

	MONDAY 8	TUESDAY 9	WEDNESDAY 10	THURSDAY 11	FRIDAY 12
21:00	<i>Os Malucos do</i> <i>Riso</i> . SIC (comedy) SP Filmes Share: 36.6% Rating: 15.7%	<i>Big Brother IV</i> . TVI (reality show) Endemol Share: 33.3% Rating: 14.3%	<i>Os Malucos do</i> <i>Riso</i> . SIC (comedy) SP Filmes Share: 41.8% Rating: 17.1%	<i>Os Malucos do</i> <i>Riso</i> . SIC (comedy) SP Filmes Share: 38.4% Rating: 15.0%	<i>Idolos</i> . SIC (reality show) Fremantle Media Rating: 12.6%
22:00	<i>Big Brother IV</i> . TVI (reality show) Endemol Share: 34.3% Rating: 15%	<i>Big Brother IV</i> . TVI (reality show) Endemol Share: 40.5% Rating: 13.3%	<i>Saber a Mar</i> . TVI (telenovela) NBP Share: 34.5% Rating: 13.9%	<i>Idolos –Diário</i> . SIC (reality show) Fremantle Media Share: 37.3% Rating: 14.8%	<i>O Teu Olhar</i> . TVI (telenovela) NBP Rating: 12.2%

SPAIN

2000 (25 – 29 sept.)

PUBLIC CHANNEL TVE 1 – 24.5%

	MONDAY 25	TUESDAY 26	WEDNESDAY 27	THURSDAY 28	FRIDAY 29
22:00	<i>La ley y la vida</i> (series) USA Share: 18.5 % Rating: 7.5 %	Champions League Barcelona-	Champions League Valencia-	<i>Mary Reilly</i> (film) USA	<i>Entre morancos y Omaña</i> (magazine) Estarciera Share: 22.3 % Rating: 8 %
23:00	<i>Un hombre solo</i> (series) Gona TV n.a.*	Milán Share: 39.8 % Rating: 15.3 %	O.L.Lyonnais Share: 30.3 % Rating: 10.09 %	Share: 17.8 % Rating: 7.3 %	<i>Tu gran día</i> (contest) Gestmusic- Endemol Share: 18.5 % Rating: 4.8 %

*Only six issues produced, so share was lower than 24.5%.

PRIVATE CHANNEL Tele 5 – 22.3%

	MONDAY 25	TUESDAY 26	WEDNESDAY 27	THURSDAY 28	FRIDAY 29
21:30	<i>El Informal</i> (humour/inf.) Globomedia Share: 17.7 % Rating: 7.2 %	<i>El Informal</i> (humour/inf.) Globomedia Share: 17.2 % Rating: 7.3 %	<i>El Informal</i> (humour/inf.) Globomedia Share: 19 % Rating: 7.3 %	<i>El Informal</i> (humour/inf.) Globomedia Share: 18.6 % Rating: 7.4 %	<i>El Informal</i> (humour/inf.) Globomedia Share: 18 % Rating: 7.1 %
22:00	<i>Starship Troopers</i> (film) USA Share: 25.9 % Rating: 9.3 %	<i>Periodistas</i> (series) Globomedia Share: 21.3 % Rating: 9.4 %	<i>Siete Vidas</i> (series) Globomedia Share: 19.6 % Rating: 9.0 %	<i>Supervivientes</i> (reality show) Gestmusic Endemol Share: 17.6 % Rating: 6.9 %	<i>Forrest Gump</i> (film) USA Share: 32.1 % Rating: 9.5 %

Prime time programmes of public and private channel in Spain should last two hours.

SPAIN

2003 (22 – 26 sept.)

PUBLIC CHANNEL TVE 1 – 23.4%

	MONDAY 22	TUESDAY 23	WEDNESDAY 24	THURSDAY 25	FRIDAY 26
22:00	<i>Eurojunior</i> (contest)	<i>Smallville</i> (series)	<i>Dos policias rebeldes</i> (film)	<i>Cuéntame cómo pasó</i> (series)	<i>Pequeños grandes genios</i> (children contest)
23:00	Gestmusic- Endemol Share: 25.8 % Rating: 9.4 %	WB USA Share: 17.1 % Rating: 7.3 %	USA Share: 18.3 % Rating: 6.9 %	Cartel y Ganga Share: 37.5 % Rating: 16.1%	Gestmusic- Endemol Share: n.a. Rating: n.a.

PRIVATE CHANNEL Tele 5 – 21.4%

	MONDAY 22	TUESDAY 23	WEDNESDAY 24	THURSDAY 25	FRIDAY 26
21:30	<i>Pecado original</i> (magazine) Atlas Share: 22.3 % Rating: 8.9%	<i>Pecado original</i> (magazine) Atlas Share: 19.7 % Rating: 7.4 %	<i>Pecado original</i> (magazine) Atlas Share: 19.7 % Rating: 7.4 %	<i>Pecado original</i> (magazine) Atlas Share: 20.2 % Rating: 7.3 %	<i>Pecado original</i> (magazine) Atlas Share: 21.5 % Rating: 7.2 %
22:00	<i>CSI Miami</i> (series) CBS Share: 27.6 % Rating: 11.1 %	<i>Embrujadas</i> (series) WB USA Share: 19.00 % Rating: 9.2 %	<i>Hospital Central</i> (series) Videomedia Share: 26.7 % Rating: 10.9 %	<i>Gran Hermano</i> (reality show) Zeppelin Share: 26.9 % Rating: 10.7 %	<i>Enemigo público</i> (film) USA Share: 26.5 % Rating: 8.9 %

SWEDEN

2000 (25 – 29 sept.)

PUBLIC CHANNEL SVT 1 – 20.2%

	MONDAY 25	TUESDAY 26	WEDNESDAY 27	THURSDAY 28	FRIDAY 29
19:00	SPORTS <i>Hello Sydney</i>	SPORTS <i>Hello Sydney</i>	<i>Mitt i naturen</i> (nature program) SVT Share:14.8 % Rating:5.8 %	<i>Rederiet</i> (Swedish soap opera) SVT (inhouse prod.) Share:32.6 % Rating: 13.4 %	<i>Hornblowers</i> <i>äventyr</i> (British adventure series) ITV1 Share: 13.3% Rating: 5.7%
20:00	Todays NEWS and SPORTS	Todays NEWS and SPORTS	Todays NEWS and SPORTS	Todays NEWS and SPORTS	Todays NEWS and SPORTS

PRIVATE CHANNEL TV 4 – 27%

	MONDAY 25	TUESDAY 26	WEDNESDAY 27	THURSDAY 28	FRIDAY 29
19:00	<i>Parlamentet</i> <i>Miscelanea</i> (Swedish entertainment show) Jarowskij Enterprises Share:17.6 % Rating: 7 %	<i>Äntligen</i> <i>hemma</i> <i>Miscelanea</i> (Swedish hou- sing program) Meter Film & Television Share: 28 % Rating: 10.9 %	<i>Skilda världar</i> (Swedish drama series) Pearson Television Share: 27.2 % Rating:10.7 %	<i>Kalla fakta</i> (Swedish society) TV4 Share: 8.9 % Rating: 3.6 %	<i>TV4 10 år</i> (TV4's 10 year anniversary) TV4 Share: 50 % Rating: 20.9 %
20:00	<i>Arkiv X. forts.</i> (detective series) 20th Century Fox Share: 19.4 % Rating:7.4 %	<i>Ally McBeal</i> (drama series) David E. Kelly Production in ass. With 20th Century Fox television Share:24.3% Rating: 9.6 %	<i>Singel</i> (People is dating I TV) MTV Mastiff Share: 21.1% Rating: 7.2 %	<i>Providence</i> (American drama series) NBC Share : 21.1% Rating: 7.9 %	<i>TV4 10 år</i> (TV4's 10 year anniversary) TV4 Share: 41.5 % Rating: 18.3 %

SWEDEN

2003 (22 – 26 sept.)

PUBLIC CHANNEL SVT 1 – 27%

	MONDAY 22	TUESDAY 23	WEDNESDAY 24	THURSDAY 25	FRIDAY 26
19:00	<i>Errol</i> (Swedish family drama series) SVT Share: 19.3 % Rating: 7.7 %	<i>Uppdrag granskning</i> (Swedish society program) SVTY Share: 21.1 % Rating: 8.1 %	<i>Mitt i naturen</i> (nature program) SVT Share: 24.4 % Rating: 9.2 %	<i>Per Gessle – ta en kaka till!</i> (documentary film) Kerberos Filmproduktion HB Share: 24.9 % Rating: 9 %	<i>Diggiloo</i> (musical quiz show, celebrities) SVT Share: 45.5 % Rating: 19 %
20:00	<i>Mat</i> (Swedish cooking program) SVT Share: 36.7 % Rating: 14.6 %	<i>Tusenbröder II</i> (Swedish drama series) SVT Share: 28.3% Rating: 11 %	<i>Eugen Onegin</i> (Musical opera) Bel Air (france) Share: 5 % Rating: 1.2 %	<i>Emmygalan 2003</i> (Emmy Awards show in short) Fireworks distribution Share: 14.5 % Rating: 5.3 %	<i>När djävulen håller ljuset</i> (detective series) NRK (PS Norway) in coprod.with SVT Share: 18.9 % Rating: 7.9 %

PRIVATE CHANNEL TV 4 – 25%

	MONDAY 22	TUESDAY 23	WEDNESDAY 24	THURSDAY 25	FRIDAY 26
19:00	<i>Errol</i> (Swedish family drama series) SVT Share: 19.3 % Rating: 7.7 %	<i>Uppdrag granskning</i> (Swedish society program) SVTY Share: 21.1 % Rating: 8.1 %	<i>Mitt i naturen</i> (nature program) SVT Share: 24.4 % Rating: 9.2 %	<i>Per Gessle – ta en kaka till!</i> (documentary film) Kerberos Filmproduktion HB Share: 24.9 % Rating: 9 %	<i>Diggiloo</i> (musical quiz show, celebrities) SVT Share: 45.5 % Rating: 19 %
20:00	<i>Mat</i> (Swedish cooking program) SVT Share: 36.7 % Rating: 14.6 %	<i>Tusenbröder II</i> (Swedish drama series) SVT Share: 28.3% Rating: 11 %	<i>Eugen Onegin</i> (Musical opera) Bel Air (france) Share: 5 % Rating: 1.2 %	<i>Emmygalan 2003</i> (Emmy Awards show in short) Fireworks distribution Share: 14.5 % Rating: 5.3 %	<i>När djävulen håller ljuset</i> (detective series) NRK (PS Norway) in coprod.with SVT Share: 18.9 % Rating: 7.9 %

UNITED KINGDOM

2000 (11 – 15 sept.)

PUBLIC CHANNEL BBC 1 – 27.5%

	MONDAY 11	TUESDAY 12	WEDNESDAY 13	THURSDAY 14	FRIDAY 15
19:00	<i>East Enders</i> (popular drama) BBC Share: 50 % Rating: 12.00 %	<i>East Enders</i> (popular drama) BBC Share: 53 % Rating: 11.89 %	<i>Britain running dry</i> (documentary) BBC Share: 34 % Rating: 7.7 %	<i>East Enders</i> (popular drama) BBC Share: 52 % Rating: 11.68 %	<i>Fawlty Towers</i> (comedy) BBC Share: 23 % Rating: 5.59 %
19:30	<i>Changing rooms</i> (lifestyle) Bazal Productions Share: 29 % Rating: 6.99 %	<i>Castaway 2000</i> (docusoap) Lion TV Share: 27 % Rating: 6.42 %	<i>Vets in practice</i> (docusoap) Bazal Share: 33 % Rating: 6.69 %	<i>Airport</i> (docusoap) BBC Share: 28 % Rating: 6.63 %	<i>Parkinson</i> (talkshow) BBC Share: 24 % Rating: 5.55 %

PRIVATE CHANNEL ITV – 30%

	MONDAY 11	TUESDAY 12	WEDNESDAY 13	THURSDAY 14	FRIDAY 15
19:00	<i>Coronation Street</i> (popular drama) Granada (for ITV Network Centre) Share: 67 % Rating: 15.21 %	<i>Emmerdale</i> (popular drama) Yorkshire (for ITV Network Centre) Share: 46 % Rating: 9.58 %	<i>Coronation Street</i> (popular drama) Granada Share: 46 % Rating: 10.87 %	<i>Emmerdale</i> (popular drama) Yorkshire Share: 46 % Rating: 9.99 %	<i>Coronation Street</i> (popular drama) Granada Share: 59 % Rating: 13.73 %
19:30	<i>Who wants to be a millionaire?</i> (gameshow) Celador Share: 41 % Rating: 10.02 %	<i>The Bill</i> (police soap) Carlton (for ITV Network Centre) Share: 30 % Rating: 7.83 %	<i>Emmerdale</i> (popular drama) Yorkshire Share: 48 % Rating: 9.64 %	<i>Who wants to be a millionaire?</i> (gameshow) Celador Share: 40 % Rating: 9.94 %	<i>The Bill</i> (popular drama) Carlton Share: 34 % Rating: 8.35 %

UNITED KINGDOM

2003 (9 – 13 sept.)

PUBLIC CHANNEL BBC – 26%

	MONDAY 9	TUESDAY 10	WEDNESDAY 11	THURSDAY 12	FRIDAY 13
19:00	<i>Eastenders</i> (soap opera) BBC Share: 52.17 % Rating: 12.68 %	<i>Eastenders</i> (soap opera) BBC Share: 57.73% Rating: 12.69%	<i>Aiport USA</i> (docusoap) BBC Share: 20.23% Rating: 4.45%	<i>Eastenders</i> (soap opera) BBC Share: 55.74% Rating: 11.29%	<i>Eastenders</i> (soap opera) BBC Share: 54.18% Rating: 12.03%
19:30	<i>Ground Force America</i> (gardening) Endemol Share: 20.85% Rating: 5.45%	<i>Holby City</i> (popular realistic medical drama) BBC Share: 31.92% Rating: 7.55%	<i>Shops, Robbers and Videotape</i> (crime reality) BBC Share: 19.73% Rating: 4.29%	<i>Garden SOS</i> (gardening) BBC Share: 22.57% Rating: 4.78%	<i>My Hero</i> (comedy) Big Bear Films Share: 28.22% Rating: 6.49%

Number Five

156

PRIVATE CHANNEL – 22.7%

	MONDAY 9	TUESDAY 10	WEDNESDAY 11	THURSDAY 12	FRIDAY 13
19:00	<i>Coronation Street</i> (soap opera) Granada Share: 60.59% Rating: 13.69%	<i>Emmerdale</i> (soap opera) Yorkshire Share: 47.21% Rating: 9.2%	<i>Coronation Street</i> (soap opera) Granada Share: 56.54% Rating: 12.15%	<i>Emmerdale</i> (soap opera) Yorkshire Share: 47.94% Rating: 8.91%	<i>Coronation Street</i> (soap opera) Granada Share: 57.15% Rating: 11.96%
19:30	<i>Coronation Street</i> (soap opera) Granada Share: 49.93% Rating: 13.12%	<i>Trial and Retribution</i> (drama) La Plante Productions Share: 32.39% Rating: 7.3%	<i>Emmerdale</i> (soap opera) Yorkshire Share: 49.95% Rating: 9.13%	<i>The Bill</i> (police show) Thames Share: 33.29% Rating: 7.33%	<i>Emmerdale</i> (soap opera) Yorkshire Share: 47.07% Rating: 8.91%

June 2004

Annex IV. National consultants

AUSTRIA	Christian Steininger Universität Salzburg Institut für Kommunikationswissenschaft
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IRELAND	Roddy Flynn School of Communications DCU
ITALY	Jorge Milán and Daniel Arasa Facoltà di Comunicazione Sociale Istituzionale Pontificia Università della Santa Croce
NETHERLANDS	Richard Van de Wurff Faculty of Social and Behavioural Sciences University of Amsterdam
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