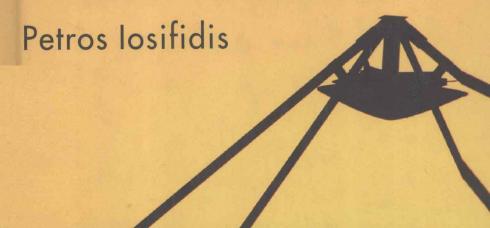
PUBLIC TELEVISION IN THE DIGITAL ERA

TECHNOLOGICAL CHALLENGES AND NEW STRATEGIES FOR EUROPE





Public Television in the Digital Era

Technological Challenges and New Strategies for Europe

Petros Iosifidis
City University, London





© Petros Iosifidis 2007

All rights reserved. No reproduction, copy or transmission of this publication may be made without written permission.

No paragraph of this publication may be reproduced, copied or transmitted save with written permission or in accordance with the provisions of the Copyright, Designs and Patents Act 1988, or under the terms of any licence permitting limited copying issued by the copyright Licensing Agency, 90 Tottenham Court Road, London W1T 4LP.

Any person who does any unauthorised act in relation to this publication may be liable to criminal prosecution and civil claims for damages.

The author has asserted his right to be identified as the author of this work in accordance with the Copyright, Designs and Patents Act 1988.

First published 2007 by PALGRAVE MACMILLAN Houndmills, Basingstoke, Hampshire RG21 6XS and 175 Fifth Avenue, New York, N.Y. 10010 Companies and representatives throughout the world

PALGRAVE MACMILLAN is the global academic imprint of the Palgrave Macmillan division of St. Martin's Press, LLC and of Palgrave Macmillan Ltd. Macmillan® is a registered trademark in the United States, United Kingdom and other countries. Palgrave is a registered trademark in the European Union and other countries.

ISBN-13: 978-1-4039-8961-1 hardback ISBN-10: 1-4039-8961-3 hardback

This book is printed on paper suitable for recycling and made from fully managed and sustained forest sources.

A catalogue record for this book is available from the British Library.

Library of Congress Cataloging-in-Publication Data losifidis, Petros.

Public television in the digital era: technological challenges and new strategies in Europe / Petros Iosifidis.

p. cm.

Includes bibliographical references and index.

ISBN 1-4039-8961-3 (alk. paper)

1. Public television—Europe. 2. Public broadcasting—Technological innovations—Europe. I. Title.

HE8700.79.E85I67 2007 384.55'4094—dc22

2007017069

10 9 8 7 6 5 4 3 2 1 16 15 14 13 12 11 10 09 08 07

Printed and bound in Great Britain by Antony Rowe Ltd, Chippenham and Eastbourne Public Television in the Digital Era

Also by Petros Iosifidis

EUROPEAN TELEVISION INDUSTRIES (with J. Steemers and M. Wheeler)

此为试读,需要完整PDF请访问: www.ertongbook.com

To my daughter Eftihia who always inspires me

Preface

The European television industry is undergoing profound technological, economic, socio-cultural and regulatory changes. These changes open up new opportunities for businesses to expand and converge and offer viewers a vast array of TV offerings at a national or even international level. However, these developments present a formidable challenge for public television (PTV) broadcasters, who for a number of decades enjoyed a monopoly status and were tasked to preserve the national culture, language and identity.

The aim of this book is twofold. First, it examines the way technological developments and the internationalisation of the television industry affects these guardians of the public interest. Secondly, it focuses on the policies pursued by PTV broadcasters in selected European countries in response to the challenges that confront them in the era of digital convergence. The changes in the European television landscape force public channels to rethink their position toward new digital technologies, organisational structures, and programming policy and scheduling. In order to illustrate the difficulties but also the opportunities that arise during this period of change, the book analyses specific activities and strategies undertaken by public channels in the main areas examined (reorganisation, programming and technology) in three large and three small European countries (Britain, France, Spain, Sweden, Ireland and Greece). Information has been gathered partly from secondary, but mainly from primary sources (interviews).

This volume intends to fill a growing need for research that would address contemporary developments in television and the public service institutions that operate within the sector from a European perspective. The international nature of developments in the field of television has made it necessary to develop a comparative approach among national situations with local variations and use this experience to arrive at workable suggestions concerning the role of public channels. The discussion of public television across Europe moves

from the more general and theoretical Part I to the more specific and empirical Part II, which includes six case studies. The text is addressed to scholars and students in Sociology and Media and Communications Departments across Europe and intends to develop discussion and stimulate thinking in the field.

Acknowledgements

This volume would not be written without the generous support and funding from the Department of Sociology, City University. I would like to express my gratitude to Nicholas Nicoli, PhD candidate at City University, London, who undertook some of the interviews for the purposes of this research as well as his valuable feedback. My special thanks are due to those who agreed to be interviewed for this volume and very generously provided insight information. I am also very grateful to Jeremy Tunstsall, Emeritus Professor at City University and Jeanette Steemers, Professor at the University of Westminster, for their welcomed comments and suggestions at the beginning of this effort. Thanks also to Jill Lake at Palgrave Macmillan for helpful advice.

Every effort has been made to trace all copyright holders, but if any have been inadvertently overlooked, the publisher will be pleased to make the necessary arrangements at the first opportunity.

Contents

List of Tables	
Preface	xv
Acknowledgements	xvii
Part I General Overview	1
1 Introduction, Aims and Methodology	3
Significance of the TV industry	3
Public television	5
The US model	5
The European model	6
The mission of public television	8
Public TV in a competitive market	8
Political and economic developments	9
Technological changes	9
Socio-cultural shifts	10
Regulatory changes	10
Market concentration	11
Dilemmas	12
Competition and programming strategies	12
Funding method	13
Investment in new technologies	14
Organisational reform	15
National strategies	16
Aim of the book	17
Methodology	18
Limitations	20
Sources	21
Structure of the book	21
2 Factors Affecting the Development of Public Television	22
Technological factors	22
Cable and satellite delivery methods	22

The Internet	23
Company investments	25
Changing consumer habits?	25
Third Generation (3G) mobile telephony	2ϵ
Digital television	27
DTV adoption	28
Strategic alliances between DTV consortia	30
Regulating digital TV services	31
Political and economic factors	33
Deregulation and liberalisation	33
Critique	35
Can the free market deliver programme diversity?	36
Globalisation and media concentration	36
Regulation and media concentration	39
Social changes	41
Consequences on public television	42
3 Competition and Dilemmas	47
Competition	47
National markets	48
Effects of competition on public channels	51
Slight increase in TV viewing time	54
Internet users spend less time in front of television	55
Funding model	56
The licence fee	58
Commercial revenue	60
State funding	61
Programming strategies	62
Towards programming convergence?	63
Publicly funded PTV broadcasters' output	64
The SVT case	66
Programming of the PTV broadcasters that depend on	
advertising revenues	66
The ERT case	67
The TVE case	68
The German and Italian cases	68
Distinctive PTV broadcasters	69
Involvement in new technologies	70
The BBC case	72

The case of France Télévisions	73
The RTE case	74
Strategic alliances	74
Organisational restructuring	76
The case of France Télévisions	77
The BBC case	78
Conclusion	79
Part II National Cases	81
4 Britain	83
General characteristics of the TV market	83
The regulatory framework	85
Public television	88
Funding	88
Audience shares	89
Multi-channel development	89
Programming	90
Governance reform	93
Investment in new media	94
Criticism on BBC's new services	95
BBC's new services and the licence fee	96
Commercial activities	98
Restructuring	100
Prospects for the BBC	101
5 France	105
General characteristics of the TV market	105
The regulatory framework	107
Public television	109
Funding	110
Programming policy	111
Thematic portfolio	114
Digital initiatives	115
Development of DTT	115
Prospects for France Télévisions	116
6 Spain	120
General characteristics of the TV market	120

x Contents

	The regulatory framework	122
	Public television	124
	Audience shares	124
	Funding	123
	Programming strategy	120
	Digital initiatives	129
	Restructuring attempts	130
	Prospects for TVE	133
7	The Republic of Ireland	136
	General characteristics of the TV market	136
	The regulatory framework	138
	Public television	139
	Audience shares	140
	Funding	143
	Programming policy	142
	Independent production	145
	Organisational development	145
	Involvement in new technologies	147
	Digital terrestrial television	147
	Multimedia services	149
	Thematic channels	149
	Prospects for RTÉ	149
8	Sweden	152
	General characteristics of the TV market	152
	The regulatory framework	154
	Public television	155
	Funding	155
	Audience shares	156
	Reorganisation	156
	New services	158
	Programming strategy	158
	Prospects for SVT	160
9	Greece	163
	General characteristics of the TV market	163
	The regulatory framework	165
	Public television	166

Audience shares	166
ERT's income	167
Restructuring efforts	168
The implementation of the early retirement	
programme	170
Next phase of ERT's modernisation	171
Programming strategy	172
Criticism	174
Digital initiatives	175
Prospects for ERT	176
10 Discussion and Conclusion	178
Notes	185
Bibliography	191
Index	201

List of Tables

2.1	DIV Household Adoption in Europe (June 2005)	29
2.2	Development of the Western European sports rights	
	market (1992–2005, US\$m)	45
3.1	Television liberalisation in the six European markets	
	under study	52
3.2	Cable, satellite and multi-channel penetration in the six	
	European countries under study (%, 2004)	52
3.3	Impact of new channels on audience share in Britain	53
3.4	Viewing time per individual (in minutes, 2003)	54
3.5	Evolution of the public channels' average daily viewing	
	shares (1997–2005)	55
3.6	Funding models of PTV broadcasters in the counties	
	under study (%, 2005)	57
3.7	Annual TV licence fees in the countries studied (in 2005,	
	Euros)	58
3.8	Level of advertising revenue for public and private	
	channels in Europe (1990–95, US\$m)	60
3.9	Programming genres of public channels in selected	
	countries (%, 2004)	65
4.1	BBC revenues (2005, £m)	88
4.2	Annual % shares of viewing (individuals) (1985–2005)	89
4.3	Multi-channel development 1992–2006 (homes 000s)	90
4.4	BBC One and BBC Two hours of output by genre	
	(2004–2005)	91
4.5	Allocation of cost of the BBC's TV services	
	(1999, 2002, £m)	95
5.1	Audience shares of the national terrestrial TV channels	
	in France (1995–2005)	109
5.2	Annual output of the national terrestrial TV channels in	
	France – breakdown by genre (%, 2002)	112
6.1	Audience shares of the Spanish TV channels	
	(1999–2005)	125
6.2	Revenues for free-to-air TV in Spain (2004, Euros m)	126

6.3	Public channels in Spain: share of transmissions by	
	genre (%, 2004)	127
7.1	National individual all day and peak-time channel	
	shares in Ireland (%, 2005)	140
7.2	RTÉ's income sources (1998–2005, Euros m)	141
7.3	Top 10 TV programmes in Ireland in 2005	143
7.4	Indigenous hours of content on RTÉ's in peak-times	
	by genre (2004)	144
8.1	Breakdown of income for Swedish SVT (1998, 2000)	156
8.2	Audience shares of television channels in Sweden	
	(%, 2001, 2005)	157
8.3	SVT programming genres (%, 1991–2004)	160
9.1	Annual % audience shares of the Greek TV channels	
	(1992–2005)	167
9.2	ERT's income (in million Euros, 1997–2005)	167
9.3	Advertising expenditure of TV channels in Greece	
	(million Euros 2000, 2003)	168
9.4	ERT's programming mix by genre (1998–99 and	
	2004–2005)	173
9.5	Programming mix by genre – ERT, MEGA, ANT1	
	(2004–2005)	173
9.6	Top 10 TV programmes in Greece (2005)	174

Part I General Overview