



***SURVEY OF
REGIONAL TELEVISIONS IN EUROPE
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PART ONE - PUBLIC TELEVISION

AND TELEVISION DECENTRALISATION IN EUROPE:

SEVERAL EMPHASISED CASES

PRESENTATION

By Giuseppe Richeriⁱ

The research was conducted in spring 2003, with the objective of identifying the main characteristics of public television on the regional level in four large European countries – Spain, France, the United Kingdom, and Germany, which provide a wide range of elements for comparison. Furthermore, the situation of the public regional television in Switzerland was outlined, as well as that in Poland and Romania, two representatives of the group of eastern European countries, soon to be integrated into the European Union. Researchers with expertise in each involved country 's television situation have contributed to this research. Giuseppe Richeri from the Università della Svizzera Italiana in Lugano, who wrote the Final report, was in charge of the research. Daniele Doglio (United Kingdom), Karol Jakubowicz (Poland), Cristina Lasagni (France and Switzerland), Bernat Lopez (Spain), Susanne Nemes (Romania), and Benedetta Prario (Germany) contributed to it.

The obtained data and information enable us to outline a sufficiently broad and detailed overview of the main analysed situations, even if their heterogeneity (history, structure, size, etc.), together with the variety of the available sources and official data in each country, prevent us from adopting a unique scheme of presentation. We have preferred to present each case so as to emphasise its specific qualities, yet obtaining a series of comparable structural data for each country. It should be noted that in this report, we have used the German *Laender*, the Swiss cantons, the Romanian districts, and the "nations" of the United Kingdom etc. as regional units.

INTRODUCTION

What follows from the analysis of the surveyed cases is a high level of variety of public television activity on the regional level. This clearly depends on the size of the territory and population of each country, on the central and local administrative organisation, on the level of linguistic homogeneity, and a series of other historical, political, and cultural factors. For this reason it is difficult to talk about veritable models of public regional television. In reality, however, there is an important factor of distinction, which allows us to subdivide the surveyed cases in two large categories: the statute of regional television centres in terms of independence or organic dependence on the national television companies.

In Spain and Germany, there are public regional television centres independent from national television companies. In Spain, France, the United Kingdom, Poland, Romania, and Switzerland, there are regional centres, which constitute an organic and integrated part of the national television companies. Furthermore, there are elements that vary from case to case within each category. Spain enters in both categories, because both the public television centres that depend on regional public institutions, and "decentralised" centres of the RTE, the national public radio-television company, operate on the regional level. In France, the regional centres are a part of France 3, one of the public national networks, and the level of locating its transmissions is more detailed in comparison with other surveyed cases. Actually, the "proximity" transmissions are added to regional transmissions, which interest 42 distinct urban areas. In the United Kingdom, all public regional television activities depend on the BBC, the public national radio-television company, but they are divided in two categories: the first, with higher level of autonomy includes the three geographical areas, considered nations: Wales, Northern Ireland, and Scotland; while the other category includes regions that are a part of England. In Germany, the national-regional relationship is reversed, because here public national television activity depends on the regional television institutions (of the *Laender*). For historical and political reasons, the legislative authority is entrusted to the Regions, which, through their television companies, organise two national television channels and a series of television channels with local coverage. In Poland, regional centres are a part of the TVP, but they manage a national channel with programming broadcast both nationally and regionally. In Romania, regional centres are a part of the TVR, public national television company, and they produce a programming of regional "windows". In

Switzerland, regional centres are a part of the *SSR Idée Suisse* and each manages two entire regional channels, while national television channels do not exist.

The second interesting factor concerns the level of the exploitation of the regional centres' activities on the national level. In the field of production, the country with the most extensive contribution of the regional centres to the national programming is the United Kingdom, where the BBC produces at least one third of all programmes intended for the national networks "outside of London and the south-east region". In France, however, there is the experience of the Tele Video 3 service, THROUGH which each regional centre and every public national network (in certain conditions, even private ones) can watch, choose, and use contents produced by other regional centres. In Germany, the regional centres, besides managing the national networks, produce programmes for both regional and national broadcasting through their production centres. Even if then the two public national networks organise their own production in specific structures. Furthermore, each regional channel is accessible on the entire national territory via satellite and/or cable. The latter opportunity is offered in Switzerland as well, through the networks of teledistribution via cable to which approximately 90 percent of the families is connected. In Spain, regional centres of the public national television company mostly perform the function for local correspondents, but some centres, especially the Barcelona centres, contribute in a non-marginal way to the production of programmes intended for national broadcasting.

The third factor of comparison concerns the relationship between the regional television centres and the regional political, cultural, and social context. In almost all surveyed cases, the regional television centres have more or less binding relationships with representatives of the regional social context.

In Germany, every region appoints a Radio-television board, composed of delegates of the so-called "relevant" social groups (churches, unions, women's organisations, youth organisations, etc.) and representatives of political parties chosen among the members of the regional Parliament, while political parties are represented by 5 members of the Parliament, who complete the Board. The tasks of the Board range from appointing the president of the regional television to controlling and approving the annual balance sheet, from defining the programme proposals to supervision of the entire radio-television programming.

In each nation of the United Kingdom the BBC appoints the *National Broadcasting Council* (NBC), consisting of a president, and a minimum of 8 to the maximum of 12 members, chosen after consultations among persons particularly representative of cultural, religious, and institutional components of each nation. The task of the NBC is to represent "the taste and cultural and linguistic interests distinctive of their own nation". In order to attain this objective, they can autonomously establish their own internal rules, set up Advisory boards, employ personnel, etc.

In Spain, activities of the TVE regional centres are present in each autonomous community, under the supervision of an Advisory Board appointed by each regional Parliament, with the task of "studying the necessities and capacities of the autonomous community in view of an adequate decentralisation of radio-television services". As regards autonomous regional televisions, in some regions there are still independent authorities, like *Consll de l' Audiovisual de Catalunya*, an organ with broad powers of inspection and control of the contents of regional television programmes.

Among other surveyed countries, France is the only country where formalised relations among regional television centres and representatives of the social context do not exist.

The fourth factor of comparison concerns the production and the programming. In this respect, there are two clearly distinguished groups. One is composed of public regional televisions that manage their own television channel with regional coverage, like Spain (in case of autonomous public televisions), Germany, and Switzerland. Here, the productive capacity and programmes of regional interest cover a wide range of television genres: from the news and up-to-date information to entertainment, from sports to culture, from the children's programmes to the television fiction (in some cases, like Spain). The other group consists of regional centres of the national channels, with "windows" of regional programming inserted into national channels, which is the case of the Spanish RTE, France, the United Kingdom, Poland, and Romania. In these cases, the predominant, if not the only, television genre in regional television transmissions are the news and up-to-date information.

A distinctive element can be identified in case of France, where the France 3 inserts "windows" of inter-regional (up-to-date information and the news), regional (the news), and local (the news) programmes into the national programming in 42 urban areas.

The fifth factor concerns the digital ground television on the regional level. The two most advanced situations seem to be those of Spain and Germany.

In Spain, the regions that have one channel for autonomous regional broadcasting may have one digital ground multiplex with two channels to manage directly, and two others to either manage directly, or grant

concessions to private televisions. The region of Madrid was the first to activate a regional public channel in digital ground technology.

In Germany, a very detailed plan for the development of digital ground television on the regional level has been elaborated. 6 pilots have already started in different parts of the country. The most advanced one is in Berlin. The Berlin project is especially important, because it is the first European (perhaps even global) case where analogue transmissions are rapidly being abandoned in order to convert to entirely digital technology by 2003.

In the analysed cases, many other aspects regarding, among other things, economic resources, production costs, regional audience, personnel, programme, etc. were emphasised. These aspects are linked to the specific characters of each case, which cannot be categorized and that can be appreciated on the following pages.

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PART TWO - REGIONAL TELEVISIONS IN EUROPE: DATA COMPARED

Survey of regional television in Europe

Introduction

In order to conduct this survey, a questionnaire was sent to all public television companies operating at the territorial regional level. By April 10th, 2003, 17 television companies answered, active in the following countries - Austria, Belgium, Bosnia Herzegovina, Croatia, Denmark, Faroe Islands, Germany, Greece, Hungary, Italy, Macedonia, Norway, the Netherlands, Poland, Spain, Sweden, and the United Kingdom. On the basis of the data and information thus obtained, the main characteristics of the sector have been outlined, in a manner to identify differences and common factors of the seventeen considered cases.

The synthesis report was prepared by Cristina Lasagni and Giuseppe Richeri from the Università della Svizzera Italiana di Lugano.

General overview

The overview of the surveyed countries' regional televisions reveals great varieties. This clearly depends on the size of each country, on the territorial administrative organisation, level of linguistic homogeneity, and a series of other historical, political and cultural factors. There are countries with only one regional television station, like Greece, and others with more than 10 regional stations, like Italy, the Netherlands, Poland, Spain, and Switzerland. In some cases, all regions of a country are provided with a specific television programme, while in others, like Bosnia and Poland, only some regions have their programmes. Spain is in this respect an exception, because in some of its regions regional programmes are simultaneously offered on three public channels. In some cases, for example in the surveyed eastern European countries, the television system has been recently reformed, and is still in the phase of adjustment, which refers to the dimension of regional television as well. In Belgium, the television is only regional, corresponding to the three principal linguistic areas, but there is no television programme that would take the entire national territory as its reference. The Faroe Islands television is self-defined as simultaneously national and regional: the region is in fact a part of Denmark, but it has its own government, high level of autonomy, its own language and culture, so its television (in the Faroese language) has a dimension that enables us to include it among the regional European televisions.

There are two models of regional television that can be clearly distinguished (on the basis of the gathered data), and they correspond to the relationship between the national television network and the regional television stations. In one case, the regional public television stations are independent, while in the other they are a part of the national public network. In each case, there are two main models.

The first model is that of independent regional television stations, which produce programming intended for transmission through their own channel, or through a regional "window", included in the programme of a national channel. The first model is present in the Netherlands, Spain, Germany, and the United Kingdom, while the second model is present in Denmark and, again, in Germany and the United Kingdom. 13 independent (but co-operating) regional stations operate in the Netherlands, and each is provided with its own autonomous television channel. In Spain, there are 8 independent regional television companies: some of them work with two autonomous regional television channels (Catalonia, the Basque Country, Galicia, etc). In Germany, there are radio-television stations of the Laender that broadcast on 8 autonomous channels with regional or inter-regional coverage. In the United Kingdom, there are regional public television stations of certain "nations", like the Welsh television S4C. In Denmark, there are 8 independent regional

television stations (7 public and 1 private, but of public utility), each producing a television “window” of the respective region, which is then inserted into the programme of a national channel (only 5 percent of the national channel programme is produced by part of the regional stations). In Germany, regional information “windows”, produced by regional (even if associated) headquarters of the Laender, are included in the programme of the national channel ARD 1.

The second model is that of national television companies, which have their own regional television stations, the function of which, besides that of the local correspondent for the national channels, is to produce a regional “window” programme later inserted into the programme of the national network. This is the case of the Austrian ORF and its 9 regional stations, the Italian RAI with its 20 regional headquarters, the Norwegian NRK and its 11 regional stations, the Polish TVP and its 12 regional stations, the Spanish TVE and its 17 regional stations, the Swedish SVT and its 11 regional stations. The second model is also divided into two subversions: the first is the one where regional stations produce predominantly or exclusively programming intended for the regional “window” under their authority. The second version is that where each regional station, besides producing the television programme intended for its own “window”, also contributes to the national programme, as is the case of RAI, which has several headquarters equipped with production centres that work for the national network; the BBC, where both the “national” headquarters of Scotland, Northern Ireland and Wales and the English regional centres produce programmes for national networks; the TVP3 in Poland, where the entire programme of the channel is entrusted to the 12 regional stations. It should be noted that Spain is the only country where the two models co-exist, and where the “decentralised” regional programme of the TVE, national television company, is in competition with that of the autonomous public regional televisions.

Besides the structure of decentralisation, other information, useful for outlining the general context regarding the regional television in the surveyed countries, were also gathered.

In the regional context, digital ground television transmissions are still little developed. In Germany, development of the digital ground television in six different areas of the country is studied, while in Berlin the transmissions have already been launched, and conversion to entirely digital technology is planned for the immediate future. In Spain, a law provides that each region can grant the concession of one digital ground multiplex, but by now digital ground regional television is in function only in the region of Madrid and Navarra. In autumn of 2003, an experimental phase of Digitenne, digital ground network offering regional programme in some parts of the country, was put in operation in the Netherlands.

In the United Kingdom, two digital channels operate on the regional level: S4C (which broadcasts in the Welsh language), and Tele G (in Scotland). In Italy, several regional channels are broadcast in digital form via satellite, while Denmark is trying out a digital ground regional channel. Sweden has granted 6 concessions for regional digital televisions, the major part of which are, however, still inactive.

In some countries television transmissions are present not only on the national and regional level, but also on a more local level. However, this is a phenomenon of varying distribution.

Television stations with sub-regional or local area of transmission are predominantly private: they are numerous in Italy (700), Greece (150), Spain (150), Hungary (120), the Netherlands (102), but they are clearly less present in other countries: 53 in Macedonia, 50 in Austria, 36 in Bosnia, 22 in Norway, 11 (plus 16 extremely small ones) in Sweden, 10 in Denmark, less than 10 in the United Kingdom, 6 in Croatia, and 3 in Belgium.

Of the regional televisions with a programme entirely dedicated to a linguistic minority, 4 are in Spain (in Catalonia, Galicia, the Basque Country, and Valencia), 2 in Denmark, 2 in the United Kingdom (already mentioned, in Welsh and in Scottish), 1 in the Netherlands, 1 in Italy (Sender Bozen), and 1, on the national level, in Hungary.

In some cases, an important percentage of viewers watch foreign television channels either by transmission networks via cable and satellite, or by trans-boundary reception via ground ether.

The countries in which this phenomenon is more present are Belgium, Bosnia, Croatia, Denmark, Sweden, and the United Kingdom, while the impact of foreign television is defined as minimal in other countries.

The access to the digital television through different platforms varies from case to case. The highest percentage of "digital" households is found in Denmark, where 50 percent of the families receive digital television channels; in the United Kingdom (39 percent), Norway (25 percent), Italy (23 percent), Sweden (20 percent), and Austria (11 percent). In most other countries, the phenomenon is still little present (less than 1 percent in Hungary, 1 percent in Greece, less than 5 percent in the Netherlands).

In the sphere of digital television, only 5 countries have precisely defined deadlines. Italy expects to abandon analogue ground television transmission and convert onto entirely digital technology by 2006, the Netherlands, Denmark, and Sweden (with a not yet final decision) by 2007, while the date Austria has established is the year 2012. No other country, among those surveyed, is at present able to indicate a precise date of this change.

With regards to the imminent changes of the national television structure, news are expected in 7 countries by 2003: in Austria, there will be a considerable increase of local television stations; in Denmark, the national network TV2 Denmark and its affiliate, the TV2 Zulu will be privatised; in Poland, the Parliament has to pass a new law on regulation of the entire television system; in Sweden, the Parliament has to pass a law on regulation of the digital television, while in Spain the rules for the local television stations will be formulated. In Italy, the bill on radio-television system, containing norms regarding the competition and market and proposing the privatisation of the RAI is being discussed in Parliament. Finally, in the United Kingdom, all the transmissions of the BBC 15 regional stations will be available via satellite; a new unified authority regulating all public and private televisions, as well as telecommunications, is planned by autumn.

2. The surveyed broadcasting stations and their main characteristics

The broadcasting stations that participated in the survey are mostly affiliates of the national companies, except for the Danish and the Dutch broadcasting companies, which are autonomous.

ARD (Germany)
BBC (United Kingdom)
Croatian Radio-television (Croatia)
ERT S.A. (Greece)
MKRT (Macedonia)
MTV Co. (Hungary)
NRK (Norway)
ORT (Austria)
PBS BIH (Bosnia Herzegovina)
RAI (Italy)
RTV Noord (The Netherlands)
RTVV (Region of Valencia)
RTBF (Belgium)
SVT (Sweden)
Telewizja Polska TVP (Poland)
TV SYD (Denmark)
UTVARD Foroya (Faroe Islands)

The broadcasting stations are in some cases managed by public enterprises (United Kingdom, Belgium, Bosnia, Greece), in others by enterprises of private rights but public property (Italy, Croatia, Norway, Poland, Spain, Hungary), in others still by foundations (Austria, the Netherlands, Sweden), and in one case by a private enterprise (Denmark).

2.1. Programme production

The quantity of the weekly produced hours on the regional level varies from case to case. In Spain, RTVV broadcasts 150 hours on Canal 9 and 125 hours on Plus Dos every week. In Italy, RAI produces 132 hours on the regional level; the BBC broadcasts 90 hours per week in the United Kingdom. In Poland, each of the 12 regional television stations produces approximately 11 hours of programme for the regional transmission; the 8 Danish regional stations produce 15 hours each; the 13 Dutch stations produce 8 hours. All regional stations put together produce 55 hours per week in Bosnia; 50 hours in Hungary, 23 hours in Norway; 27 hours in Austria; while the only Greek regional station produces 18 hours per week.

Identifying the type of the transmitted regional programmes is not easy, because in some cases, the division into television genres in terms of percentage is not available. The genre that seems to be predominant in most cases is the genre of the news and information programmes: in Norway, exclusively news and up-to-date information (2 hours per week per regional station on the average) are broadcast, as is the case with Italy (5h35'), Austria, Macedonia, and Sweden. In Denmark, the predominant genre is the news, followed by sports and chronicle; in the United Kingdom the news (6 h) are followed by chronicle (2h) and Parliamentary chronicle (2h); in Italy, RAI Tre broadcasts three editions of the news bulletin (the main edition lasts 20 minutes) every day and a 30-minute weekly section in 20 regions; in the Netherlands, the weekly programme time is divided among the news (1h 45'), chronicle (1h 45'), culture (1h), sports (1h), and other genres (2h 30'). In Spain, there are variety channels with many types of programmes: the news and up-to-date information (46 percent), children's programmes (23 percent), sports (15 percent), and culture (10 percent). It is interesting to note that in Hungary culture covers major part of the regional programme (5h), while 2 hours per week are dedicated to information. What clearly distinguishes the Polish television among all others is that on average 27 percent of the regional programme is dedicated to films, while the news takes up 23 percent, documentaries 14 percent, chronicle 13 percent, and sports and culture 4 percent of the programme.

The Omrop Fryslan, a station in the Netherlands, produces all transmissions in the second language spoken in the country; RAI (Italy) produces 21 hours per week in a second language; the BBC (United Kingdom) broadcasts 11 hours in a different language; the Swedish broadcasting company SVT produces 3 hours of weekly programme in a second language, while the Norwegian NRK produces 14 percent of such programme. No other surveyed broadcasting station broadcasts parts of the programme in a different language.

Types of co-operation with other national and foreign broadcasting stations are rather limited. The most important cases are the BBC, with 520 annual hours produced by the BBC Wales with S4C; the Danish case, where the TV SYD co-operates with the German NDR, Nord Deutsche Rundfunk (but other Danish regional stations also have different forms of international co-operation); the Italian RAI, that co-produces 60 annual hours, the Swedish SVT that co-produces 30 annual hours with the Danish TV2 Lorry; and of two Polish stations – TVP 3 Wroclaw (with the Austrian ORB 2 a 26-minute magazine per month), and TVP 3 Rzeszow (it produces a 26-minutes monthly magazine with the Czech, Hungarian, and Slovak regional stations). In other cases, co-operation with other televisions is less important; a few hours are occasionally produced in the Netherlands (5 annual hours), Belgium, with France 3, and in Hungary, as aforementioned.

The results suggest that the length of the main regional transmission of all the surveyed broadcasting stations is similar: approximately 20-30 minutes, broadcast mostly in the late afternoon (at 8 p.m. in the Faroe Islands, 7:30 p.m. in Denmark, Italy and Bosnia, 7:10 p.m. in Sweden, 7 p.m. in Austria, Greece and Italy, 6:30 p.m. in the United Kingdom, 6:40 p.m. in Norway, 6 p.m. in Poland). The exceptions are Belgium and Hungary, where midday time slots are preferred, with transmissions at 1 p.m. in Belgium, and repetitions at 6 a.m., noon, and 5 p.m. in Hungary. In Spain, the important timeslots are at 8 a.m., 2 p.m., and 11 p.m.

The ratings of the main regional television transmissions vary from case to case. The results suggest that the highest ratings are 60-70 percent in Austria, on the Faroe Islands and Denmark;

medium high ratings in Bosnia (44 percent), Norway (40 percent), Poland (32 percent), and Sweden (30 percent). The ratings of 13 Dutch regional stations vary from 11 to 40 percent, while in the United Kingdom they are 32 percent. Ratings are more modest in Macedonia and Hungary (20 percent), Spain (19 percent), Italy (16.8 percent), and Belgium (from 10 to 15 percent). The 18 weekly hours of the main Greek regional transmission have much lower ratings (3 percent).

It is interesting to examine how the flux of programmes from regional stations to national networks functions, or rather how many regional centres produce programmes for national networks.

In Poland, 12 regional television stations produce 100 percent of the TVP 3 network's production. In Sweden, 11 regional centres produce 55 percent of the SVT 2 national programme. In the United Kingdom, 3 regional centres (in Scotland, Wales, and Northern Ireland) produce 490 annual hours of programme for the national network. In many other cases, regional stations produce programmes for national networks, but the amount of their contribution is lower or was not stated.

In Italy, 3 regional centres (in Milan, Naples, and Turin) produce regularly for the national broadcasting station, with variable annual amounts, while all regional centres contribute to the news, in very different amounts.

In Denmark, all regional stations combined produce less than 5 percent of the hours broadcast on the national network. In the Netherlands, only 1 independent regional station out of 13 (the Omrop Fryslan) produces programmes intended for broadcasting on the national channel, with a total of 30 minutes per week. In Austria, contribution of the 9 regional stations to the national programme is very low.

The majority of the surveyed television companies also broadcast a radio programme (except for the Polish TVP), and all offer other products and multimedia services, ranging from web sites to teletext and music CDs: some are experimenting with sending SMS information to cellular phones (Italy and Sweden), while the Belgian RTBF, the BBC, and RAI produce programmes and educational packages for school on the national level.

Not all surveyed broadcasting stations have projects regarding changes in the near future. In case of Bosnia, there is a declared willingness to increase the number of the regional stations. In Poland, the objective is to create 4 new regional stations, so as to reach 16, corresponding to the number of regions. The number of regional television stations has recently increased from 9 to 11 in Sweden, and from 4 to 9 in Norway.

In two countries, Denmark and Poland, plans do not refer only to the dimension of the regional television, but also to strengthening (Poland) or starting (Denmark) public television transmissions at the local level in the near future.

2.3 Management and financing

Financing of the surveyed television companies mostly derives from three variously combined sources: licence fees, government contributions, and proceeds from commercials or sponsorship. In Sweden, Norway, and United Kingdom, financing of the public television is covered entirely by the licence fees; in Austria, the public television is financed predominantly by commercials (45 percent) and licence fees (44 percent); the same is with Italy, with 53 percent of the financing coming from the licence fees, 40 percent from commercials, and 7 percent from other sources; the Hungarian broadcasting station is financed by the state; Belgian and Greek broadcasting stations receive government funds and proceeds from commercials (80 percent to 20 percent), while in the Netherlands, the funds received by the state make up 85 percent of the proceeds, commercials provide for 14 percent, and sponsorships 1 percent.

Financing of other broadcasting stations is provided by a combination of licence fees, commercials, sponsorships, and public financing: that is the case with Bosnia, Croatia, Macedonia, and Poland (which points out commercials as the major economic source, followed by 30 percent provided by the licence fees). In case of Denmark, licence fees provide for 80 percent of the financing, while in Spain 40 percent of the financing derives from commercials, and an important part from the regional government.

In only a few cases it is possible to distinguish between the regional and the national budget. In the United Kingdom, 40 percent of the annual budget of the BBC (€7.5 billion) is divided among the regional centres. In Italy, the 2002 budget for the regional centres (for the news production only) was €13.6 million. In Austria, each regional station had a budget of €11 million in 2002. In 2001, the Belgian RTBF had a budget of €9 million, the Danish Tv SYD had a budget of €7.5 million, the NRK regional television stations in Norway had an average budget of €4 million each, the Dutch regional stations, which supplement their television broadcasts with radio broadcasts, had a total budget of €5 million for smaller, and €11 million for larger stations.

Among the surveyed broadcasting stations, 6 anticipate an increase in proceeds in the following year (the Danish TV SYD, the Macedonian MKRT, the Greek ERT, and the Norwegian NRK), while the Bosnian PBS BIH, the Dutch RTV Noord, and the Swedish SVT anticipate an unchanged income, and the Belgian RTBF anticipates a decrease.

In a few cases, it is possible to estimate the percentage of the resources of the national television companies intended for the regional television activity: it is 40 percent in case of the BBC, 25 percent in case of the Greek ERT, 20 percent in case of the Norwegian NRK, 14 percent in case of the Austrian ORT, while in the Netherlands and Denmark, as we have already mentioned, regional television stations are autonomous and they employ the total of their resources on the regional level.

2.4 Personnel employed on the regional television stations

The overview of human resources employed in the regional centres also varies.

In the United Kingdom, 4.100 employees work for 18 stations; a total of 1.500 employees work for 13 Dutch stations: on the average, each has 115 persons at their disposal, oscillating between 80 and 140, depending on the size of the station, and with a ratio of permanent employees and freelancers of 90 to 10.

Each of the 12 Polish regional television station employs between 100 and 200 people, while the 6 Hungarian stations employ approximately 150, however, with considerable variation among them. The same is with Sweden, where the number of the employed personnel varies from 80 to 300 persons, with a ratio between permanent employees and freelancers of 70 to 30 percent.

The Spanish RTVV has 1.100 employees; the Belgian RTBF 700 employees; ERT 3, the only Greek regional television, has 500 employees; 11 Norwegian regional stations have a total of 250 employees; the Bosnian broadcasting station has only 85 employees. Even fewer are the employees of each of the 8 Danish regional television stations: 65 persons, 85 percent of whom are permanent employees, and 15 percent are freelancers.

Forms of productive synergy between television and radio transmissions exist in all regional stations in the Netherlands, United Kingdom, Italy, Norway, and Belgium, while all other broadcasting stations claim not to resort to it.

In most of the surveyed cases, the personnel of the regional television stations generally receive, depending on their functions, the same salary as the personnel of the national broadcasting stations (in Belgium, Bosnia, Croatia, Denmark, Italy, Norway, the Netherlands, United Kingdom); they receive less in Macedonia, Spain, Sweden, and Hungary, while receiving more in Greece.

Also, in comparison to the main competing broadcasting stations, the salaries are more or less similar (except in the case of the Italian broadcasting station, which reports higher salaries, and Croatian and Hungarian stations, which report lower salaries).

What is the situation with the labour market, and the competition among the radio-television stations regarding the stealing of professional personalities? Has the number of transfers from one broadcasting station to another increased, or is it more or less stable?

The answers seem to indicate a decrease in competition, or at least certain stability. The mobility has decreased according to the Swedish, Italian, Bosnian, Hungarian, and Danish broadcasting station (the last one emphasises that unemployment favours certain immobility). The situation has remained more or less unchanged in Norway, while in the United Kingdom the mobility has increased. In the Netherlands, there is strong competition to get journalists and presenters,

especially on the regional broadcasting stations whose headquarters are geographically closer to the national television headquarters, while the situation on the periphery is more stable.

2.5 The level of management autonomy

Management of the regional television stations is entrusted mostly or entirely to local managers in Denmark, Italy, on the Faroe Islands, in Norway, the Netherlands, Poland, and Spain. In case of Croatia, there is a combined central-local management, while in Sweden there is greater centralization, in phase of further increase. The results do not show considerable level of decentralization in other surveyed countries.

2.6 Collecting commercials

Regional television stations gather local commercials in at least 5 countries: Poland, the Faroe Islands, Macedonia, Spain, and Denmark, where, however, the proceeds are managed on the national level. The situation in the Netherlands is the only one on which we have detailed information. The results show that regional stations annually collect € 3.5 million from national commercials and € 14 million from local commercials. The cost of a local-level commercial per viewer is higher than that of a national-level commercial only in the Netherlands and Spain; it is lower in some other cases (Bosnia, Denmark, Greece, Macedonia, and Hungary), while for others there is no data.

2.7 Methods of programming production

Regional programming is entirely produced at “fixed costs” by internal personnel on the regional television stations in Belgium and the Netherlands; mostly within the station in Norway and Denmark; in Italy, the production of the news is internal, while for other programming the regional stations have free production choice (however, the costs must be compared with internal costs). Internal priority does not exist in the United Kingdom, Bosnia, Greece, and Poland, and it is decided, depending on the case, whether to produce internally or with external resources.

2.8 Technological equipment

The following equipment is used for the production of non-information regional programmes: for filming, the DVCPRO cameras in Denmark, Sweden, and Norway (in Sweden and Norway together with the Digital Betacam). The Norwegian company emphasises a distinction between them, claiming to use the DVCPRO cameras for footage intended for the regional programmes, and the Digital Betacam and Beta SP for those intended for the national programme. The same technologies are also used in other countries; while in the Netherlands and Hungary filming is mostly done with Beta SP. In Italy, Sony D2 is used for production in general.

Montage and editing are made predominantly with the Avid systems: News Cutter, Media Composer, Avid On Air, and Avid XP for post-production.

The same technologies are used for producing news bulletins as for other programmes in Belgium, Bosnia, Denmark, the Netherlands, and Hungary; while in Sweden, there are certain differences: the DV Cam, DVC Pro 25, and Beta SP are used for filming, and News Cutter, Express, and other software for editing. The Swedish station and the RAI News channel of the Italian RAI are the only ones who use a digital server-based news and current affairs operator at the moment.

2.9 Professional competence

Regional headquarters that produce news bulletins with a “light” team of only two persons (a cameraman and a journalist) are rather numerous: in Italy, Norway, the Netherlands, United Kingdom, Spain, Sweden, and Hungary it is the norm.

Greece also uses predominantly two-persons teams, while in Poland the teams consist of a journalist, a cameraman, and a sound engineer. More traditional teams of three to four persons are used in Croatia and Bosnia.

The role of a multiskilled operator, capable of both filming and editing, is slowly spreading in numerous cases. The only exception is provided by the Norwegian NRK, where all cameramen are capable of editing, and often directing their own product; cameraman-editor represents 25

percent of engineers in Denmark, 20 percent (on the increase) in Sweden, 3 percent in the United Kingdom. This multiskilled operator is very uncommon in Poland, and entirely absent in other companies that have answered our survey.

A similar difference of geographical distribution is present in the survey of technical abilities of journalists. Many journalists from Denmark (60 percent), Norway, and the Faroe Islands are capable of editing their own reports. Both Norway and the Faroe Islands emphasise that the role of a multiskilled journalist is much more common in regional centres, compared to the national editorial staffs. This role is also spreading in Sweden, and presently constitutes 20 percent of the personnel, while in Poland it constitutes 10 percent of the personnel, and 8 percent in the United Kingdom.

The percentage of video-journalists (who autonomously film the footage) follows a trend similar to that of multiskilled engineers: all journalists in Spain, and 60 percent of Danish local journalists (the percentage is approximately 20 percent on the national level). The Norwegian broadcasting station states that 25 percent of journalists in regional editorial staff also use the camera, while video-journalists do not exist in the staff of national stations. The percentage is 10 percent in the Netherlands, 8 percent in the United Kingdom, 5 percent in Sweden, and 3 percent in Greece, while Hungary mentions "several in Budapest". On the whole, the role of multiskilled journalist, capable of using camera and editing in Avid, is spreading in different contexts, and this practice does not cause any union problems.

All the television companies that use these multiskilled roles plan to increase their number and competence. Expansion of the multiskilled professionals is in progress in Denmark and Norway, where 30 journalists will be trained in the course of the year 2003. Journalists capable of filming are on the increase in the Netherlands, and by the year 2004 they will also be capable of editing, using new digital systems. The same objective is central to a big Swedish training programme, which enables journalists to edit their own products themselves. The role of multiskilled correspondent is included in the plans of the Italian RAI, which plans to begin with local personnel. The Bosnian broadcasting station plans on moving along the same lines, in order to reduce the number of their employees.

On this subject, it should be mentioned that television stations claiming to have plans of reducing their staff are rather numerous: the Belgian, Bosnian, Croatian, Macedonian, and Polish, while the Hungarian claims to have already reduced their personnel over the past years. Other broadcasting stations do not plan to reduce their personnel, while the Danish station claims to plan a production increase (keeping the present number of employees fixed).

2.10 Education

In general, regional television stations do not have internal departments responsible specifically for education or training. Exceptions are the United Kingdom, where such departments exist on both national and regional level, and Spain. Italy claims to have a centralized regional education. Poland, Norway, and Hungary also use educational structures of a central company. Other broadcasting stations (in the Netherlands, Sweden, Croatia) turn to external companies when necessary.

Only 4 broadcasting stations are capable of singling out investments intended for education as percentage of the total salary expense: Greek broadcasting station 4 percent, the Netherlands 3 percent, United Kingdom from 1 to 2 percent, Denmark a two-week salary.

There is a broad consent on the priority of education that would broaden the range of skills of both journalist and technical personnel: multiskilling is the most frequent educational objective of companies' managers, with the objective of creating or spreading the person of video-journalist, and creating a technical staff capable of both filming and editing. Other mentioned priorities include the topics of new technologies, in order to train experts in digital television (Sweden, Poland, Greece), as well as leadership and employees' personal development (United Kingdom).

In some cases, attention is also devoted to aspects of the content: the Swedish broadcasting station considers necessary a training that would identify new contents, suitable for the new generation of viewers; the Polish station singles out the necessity of seminars for producers and journalists, and training on European integration; while the Bosnian station sets an increase of communication skills as their priority.

In many cases, executives of the television companies take a management training course at the moment of their promotion to a higher position: such is the practice in Greece, Norway, the Netherlands, Poland, United Kingdom, and Sweden. It does not happen only in Bosnia and Hungary.

Suggestions regarding the type of education the CIRCOM should offer in order to complete the locally offered trainings emphasise the necessity of improving the level of middle management (Denmark), of improving the competence in new technologies (Greece and Macedonia), of a multiskilling-oriented education (Bosnia), and of improving the screenwriting and news storyline (Macedonia). The Swedish broadcasting stations considers necessary an exchange of ideas and information, United Kingdom wants seminars that would treat radio-television topics from a European perspective, while the Hungarian broadcasting station declared that, in the case of MTV, any sort of training would be welcome.

2.11 Television quality

Few of the surveyed broadcasting stations emphasise initiatives in the field of checking and improving the quality of the programmes.

The British station conducts monthly analysis of its own journalistic offer, from the quality point of view (as regards current standards, codified through laws, ethical code and code of self-regulation, etc.); the station also analyses the quality as expected and as perceived by the viewers.

On the Polish network, there is a special commission that surveys the quality of the television offer regarding the standards, while the viewers' expectations of quality are analysed through opinion polls. The Polish network also surveys the quality of the programmes and time slots as perceived by the audience. Lastly, the Swedish network states that it surveys viewers' expectations through focus groups.

The Danish television station states to be conducting a project analysing its own television offer. The research analyses both the audience (their habits and attitudes) and the programme (surveyed from the point of view of not only objectives of public service, but also of contents and narrative modes). During the current year, more than € 100.000 will be invested into this project. The Danish broadcasting station is also conducting projects analysing the quality of the programme, time slots, and different television genres as perceived by the audience.

The Italian broadcasting station has a commission of consultants, working on the subject of quality in relation to the current standards, analysing the quality as perceived by the audience, and conducting monthly surveys of the viewers' loyalty to each of the channels.

No other broadcasting station seems to have under way or plans to conduct surveys of the quality of the programme.

3. Suggestions for CIRCOM

Search for a common ground for exchanging ideas, experiences, projects seems to be the most emphasised requirement among the broadcasting stations that have answered the survey. In response to the question of what should the future priorities of CIRCOM be, all have agreed on the usefulness of exchanging experiences regarding the topics of regional television, of taking common training courses, but also of exchanging programmes and projects; three broadcasting stations explicitly put forward the demand that CIRCOM supports quality co-productions.