# Independent television production in Catalonia in a changing market

**David Fernández Quijada**

*The aim of this article is to analyse, from the point of view of the industry, the situation of independent television production in Catalonia in the seasons 2004/2005 and 2005/2006. In the second of these seasons, two new television channels appeared that have had a vital effect on the demand for independent production, from which Catalan companies benefit directly. The article reviews the volume of independent production in Catalonia and the turnover of the main companies, as well as the presence of media groups in this area. Finally, the main markets for this production are analysed, as well as the role played by Televisió de Catalunya within this context.*

**Keywords**

Independent production, structure of the audiovisual system, cultural industries.

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The growth experienced over the last few years by the audiovisual industry has been parallel to the rise in the number of companies involved and their diversification. One of the fields where this expansion has been most clearly reflected is in production for television. The market for independent production largely depends on the status and evolution of TV channels. Consequently, 2005 seemed to be a good time: in July, the Spanish government was changing the conditions for granting a licence for a state-wide analogue channel to Sogecable[1] and an extremely subs-criber-only channel like Canal + was going to broadcast openly under the brand of Cuatro. At the same time, the same government opened the door to a new state-wide analogue channel (in spite of coverage problems) which it awarded[2] before the end of the year to Gestora de Inversiones Audiovisuales La Sexta, operating since then under the commercial name of laSexta. All these concessions were also reflected in the corresponding map of terrestrial digital television or TDT.

This change in the conditions of the Spanish market lead to an immediate rise in demand for independent production

**1** Resolution of 29 July 2005, of the Secretary of State for Telecommunications and for the Information Society, publishing the Agreement of the Council of Ministers of 29 July 2005, amending the licence contract with Sogecable, S.A. for the provision of the public service of television (Official State Journal no. 181 of 30 July 2005).

**2** Resolution of 30 November 2005, of the Secretary of State for Telecommunications and for the Information Society, publishing the Agreement of the Council of Ministers of 25 November 2005, resolving the public tender for awarding a licence to operate the public service of television under the regime of open broadcasting, held by the Agreement of the Council of Ministers of 29 July 2005 (Official State Journal no. 301 of 17 December 2005).

from the channels, in either of the two types of production available (Bustamante 1999): 'associated production' between channel and producers, which delivers a finished product to the former based on established conditions, and 'financed production', i.e. the producer makes use of the infrastructures, technical resources and largely also the human resources of the television channel in question. This definition of independent production excludes spheres such as telefilms, considered as co-production.

This article takes a preliminary look at the main Catalan producers for television based on data on independent production in television channels covering Spain and also those covering the autonomous regions, provided in the annual reports of the Audiovisual Communication Studies Office (GECA in Spanish).[3] Data are used from the seasons 2004/2005 (Pérez Ornia 2006) and 2005/2006 (Pérez Ornia 2007), excluding re-broadcasts, allowing us to evaluate how the appearance of these companies has affected Catalan producers. They are therefore characterised based on the volume of hours of production, while data have also been obtained from the commercial Register[4] on turnover and the degree of independence. Finally, the main markets for these companies are determined, relating the producers and the buyers via a social network analysis (SNA). The text concludes with a review of the role played by Televisió de Catalunya (TVC) as the main television company in Catalonia.

## Supply and suppliers

An analysis of the two seasons under study shows significant presence of Catalan producers in the Spanish TV market. In 2004/2005, 24 companies (14.37% of the total) produced 2,487.93 hours (13.79%). One year later, 36 producers (20.34%) were responsible for 3,208.33 hours (16.52%) (Table 1). We can therefore see a quantitative jump in the presence of Catalan firms in the sector: the number of producers grows by 50% and hours produced by 28.95%, a much larger increase than perceived in general in the Spanish market, with growth rates of 5.99% in the number of producers (from 167 to 177) and of 7.83% in the volume of hours (from 18,043.11 to 19,455.42). It is no exaggeration to classify this increase as spectacular, verified by a third measurement: the number of programmes in which Catalan producers were involved grew by 58.41% and went from 56.5 to 89.5.

An analysis of the data provides a result of a total of 42 different producers, of which only 18 appear in both seasons. Variety is the dominant feature of this list, made up basically of small producers and, to a lesser extent, by larger companies, of note being Gestmusic and Mediapro, which together produced more than half the total hours: 58.10% in 2004/2005 and 53.37% one year later. They also lead the field in terms of number of programmes, as the former totalled 13 in 2004/2005 and 11 the following season, while Mediapro went from 8 to 21, a growth of 162.5% which is largely related to the 10 programmes it produced for laSexta, in which it holds an interest. By number of programmes, in season 2004/2005 there is another shareholder from the same channel at the top of the ranking, El Terrat (4.5), as well as Cromosoma (4) and La Productora (3). One year later, after Mediapro and Gestmusic, come El Terrat (8), La Productora (5), Media 3.14 (5), Cromosoma (3), Diagonal TV (3) and Aruba (3).

If the sector is evaluated in terms of operating income (Table 2), no significant changes are noted between the main companies. In 2006, Mediapro exceeded 200 million euros in turnover but, in its case, it's difficult to know what

3 GECA's data come from the measurements of Taylor Nelson Sofres and refer to programmes broadcast between 06.30 and 02.30, including container programmes and excluding those lasting less than fifteen minutes. GECA also obtains information on producers concerning the allocation of each programme. As a reliability test, the data for Televisió de Catalunya have been compared with the information provided annually by the channel in its annual report. Some of the programmes mentioned by GECA do not appear on TVC's lists but the number of independently produced programmes listed by TVC is still higher than those listed by GECA. In any case, this is the only source available that allows us to make comparisons within the context of Spain. The information provided based on these data must therefore not be read in terms of absolute numbers but as trends.

4 The commercial Register was accessed via the Iberian balance sheets analysis system (SABI in Spanish) of Bureau van Dijk.

**Table 1. Catalan producers by market share**

| 2004/2005 | | | | | 2005/2006 | | | |
|---|---|---|---|---|---|---|---|---|
| **Producer** | **No.** | **Hours** | **%** | | **Producer** | **No.** | **Hours** | **%** |
| Gestmusic | 13 | 790,48 | 31,77 | 1 | Gestmusic | 11 | 869,08 | 27,09 |
| Mediapro | 8 | 655,18 | 26,33 | 2 | Mediapro | 21 | 843,27 | 26,28 |
| El Terrat | 4,5 | 229,12 | 9,21 | 3 | El Terrat | 8 | 276,42 | 8,62 |
| Diagonal TV | 2 | 126,77 | 5,10 | 4 | Diagonal TV | 3 | 276,15 | 8,61 |
| Somos Som | 2 | 94,32 | 3,79 | 5 | Aruba | 3 | 157,63 | 4,91 |
| Cromosoma | 4 | 89,32 | 3,59 | 6 | La Productora | 5 | 111,72 | 3,48 |
| Produccions Quart | 1 | 84,33 | 3,39 | 7 | Notro Films | 2,5 | 99,23 | 3,09 |
| La Productora | 3 | 60,55 | 2,43 | 8 | Produccions Quart | 1 | 91,60 | 2,86 |
| Rumbo Sur | 1 | 56,90 | 2,29 | 9 | Media 3.14 | 5 | 88,03 | 2,74 |
| Multimedia Lua | 1 | 56,85 | 2,29 | 10 | Turruá Llacer | 1 | 48,50 | 1,51 |
| Selectavisión | 1 | 54,92 | 2,21 | 11 | Cromosoma | 3 | 45,07 | 1,40 |
| Drimtim | 1 | 44,93 | 1,81 | 12 | Benece Produccions | 2 | 38,37 | 1,20 |
| Benece Produccions | 0,5 | 30,00 | 1,21 | 13 | Rumbo Sur | 1 | 36,52 | 1,14 |
| Media 3.14 | 2 | 17,58 | 0,71 | 14 | D'Ocon Films | 2 | 24,95 | 0,78 |
| Arriska S.L. | 1 | 15,08 | 0,61 | 15 | Triacom | 1 | 21,68 | 0,68 |
| Ovideo TV | 1 | 15,03 | 0,60 | 16 | Rodar y Rodar | 1 | 19,62 | 0,61 |
| Centre Promotor de l'Imatge | 2 | 14,70 | 0,59 | 17 | Paral·lel 40 | 1 | 19,35 | 0,60 |
| Trivideo | 2 | 9,78 | 0,39 | 18 | Somos Som | 1 | 18,40 | 0,57 |
| Companyia T de Teatre | 1 | 9,68 | 0,39 | 19 | Arriska | 1 | 16,08 | 0,50 |
| Aurea Documentary | 2 | 7,15 | 0,29 | 20 | Companyia T de Teat re | 1 | 15,07 | 0,47 |
| DTV | 1 | 6,92 | 0,28 | 21 | Neptuno Films | 1 | 13,42 | 0,42 |
| L'Avern | 1 | 6,67 | 0,27 | 22 | On TV | 1 | 12,77 | 0,40 |
| LUK | 1 | 6,48 | 0,26 | 23 | Sargantana Voladora | 2 | 9,83 | 0,31 |
| Paral·lel 40 | 0,5 | 5,17 | 0,21 | 24 | Sagrera TV | 1 | 9,03 | 0,28 |
| | | | | 25 | M.I.C. | 1 | 8,58 | 0,27 |
| | | | | 26 | Fair Play | 1 | 7,70 | 0,24 |
| | | | | 27 | Trivideo | 1 | 5,37 | 0,17 |
| | | | | 28 | Cancuca | 0,5 | 5,32 | 0,17 |
| | | | | 29 | Veranda TV | 0,5 | 5,32 | 0,17 |
| | | | | 30 | Selectavisión | 1 | 3,20 | 0,10 |
| | | | | 31 | Utopic TV | 1 | 2,52 | 0,08 |
| | | | | 32 | L'Avern | 1 | 2,37 | 0,07 |
| | | | | 33 | Sofa Experience | 1 | 2,23 | 0,07 |
| | | | | 34 | Aurea Documentary | 1 | 1,40 | 0,04 |
| | | | | 35 | Bausan Films | 0,5 | 1,28 | 0,04 |
| | | | | 36 | Porta Gaset | 0,5 | 1,28 | 0,04 |
| **TOTAL** | **56,5** | **2.487,90** | **100** | | **TOTAL** | **89,5** | **3.208,33** | **100** |

Source: author, produced from GECA data.

part of this total corresponds to the production of TV programmes, as the same company carries out many different activities related to audiovisuals. In any case, it and Gestmusic once again lead the field, with a rising income, particularly substantial in the case of Mediapro, which between 2005 and 2006 almost quadrupled its revenue. To these figures we must also add those of its subsidiaries, some of which (Diagonal TV and Ovideo TV) also appear among the top earners. Once again the figures for El Terrat are also of note, tripling its income between 2004 and 2005.

With regard to the location of all this production, most of the producers identified have their offices in the city of Barcelona. In general, those outside the city itself are located within the metropolitan area. The most significant are Mediapro and Media 3.14, located in the Imagina building in Esplugues de Llobregat (just outside the city of Barcelona), where the company of Alfons Arús also has its head offices, Aruba Producciones. This building, which concentrates a large number of audiovisual firms, among others the TV channel laSexta, is very near to the facilities of TVC in Sant Joan Despí and the old studios of Mediapark, in an area where DTV had its head offices and where some of the programmes by other producers were recorded, of the importance of Gestmusic and El Terrat, for example. Other companies are further away and have their offices in La Roca del Vallès (Utopic TV) or Terrassa (Neptuno Films). Only one, Porta Gaset, was loca-ted outside the province of Barcelona, specifically in Lleida.

## A truly independent sector?

Generically, we talk about independent production because it is understood that it is an activity separate from the subsequent dissemination carried out by the TV channels. In many cases, however, we should be more precise with our use of adjectives, as it could lead to confusion. Firstly, because independence is relative when producers are vertically integrated with TV channels, as is the case in Catalonia with Mediapro and El Terrat, shareholders in laSexta. Secondly, because independence from a TV channel does not automatically grant autonomy for the producer, which in many cases defines its strategy in line with the media group it belongs to. In the Catalan case, various examples can be detected:

- The group Imagina, created from the merger between Grupo Árbol and Mediapro, is present via five different

**Table 2. Main Catalan producers by volume of turnover (millions of euros)**

| No. | Producer | Legal name | 2004 | 2005 | 2006 |
|---|---|---|---|---|---|
| 1 | Mediapro | Mediaproducción S.L. | 48,78 | 55,48 | 204,02 |
| 2 | Gestmusic | Gestmusic Endemol S.A. | 53,79 | 62,25 | 73,56 |
| 3 | El Terrat | El Terrat de Produccions S.L. | 11,57 | 33,12 | 37,15 |
| 4 | Notro Films | Notro Films S.L. | 0,21 | 4,17 | 20,01 |
| 5 | Diagonal TV | Diagonal Televisió S.A. | 9,06 | 12,80 | 17,23 |
| 6 | Ovideo TV | Ovideo TV S.A. | 16,80 | 13,62 | 16,05 |
| 7 | LUK | LUK Internacional S.A. | 13,28 | 8,25 | 9,82 |
| 8 | On TV | Zeta Audiovisual S.A. | 0,00 | 4,92 | 7,91 |
| 9 | Cromosoma | Cromosoma S.A. | 9,75 | 7,74 | 6,06 |
| 10 | Drimtim | Drimtim Entertainment S.L. | 0,14 | 2,44 | 5,84 |

Source: author, produced from SABI data.

producers:

- Mediapro: the parent company, and dedicated to different activities in the field of audiovisuals, it was the second producer in number of hours broadcast, almost 1,500, with a total of 25 different programmes on 9 different TV channels.
- Media 3.14: totalled more than 100 hours in the two seasons, although its presence was quantitatively greater in the second season, especially as a supplier for Cuatro with programmes such as *Callejeros*, *Cuarto milenio*, *El especialista* and *Benidorm*.
- Ovideo TV: only appeared in the first season analysed, responsible for 15 hours of a single programme, *La memòria dels cargols* (TV3).
- Trivideo: another fifteen hours throughout both seasons and two programmes, *Mira i voràs* (Punt 2) and *Trilita* (TV3).
- Triacom: 10% owned by Mediapro, it appears on the lists for season 2005/2006 as responsible for *Cuina x solters* (TV3).

• Endemol: the leading independent European producer, of Dutch origin, controlled during the two seasons under study by the Spanish group Telefónica and currently owned by a consortium made up of the Italian company Mediaset, its Spanish subsidiary Telecinco, the bank Goldman Sachs and the company Cyrte, in which one of its founders participates, John de Mol.[5] In Catalonia it had two subsidiaries, Gestmusic Endemol and Diagonal TV:

- Gestmusic: leader in volume of hours produced during 2004/2005 and 2005/2006, with more than 1,600 shared among eight channels. Notable audience rating successes with *Operación Triunfo* (Telecinco), *Crónicas marcianas* (Telecinco), *Mira quién baila* (La Primera) and, in the Catalan area, *Veterinaris* (TV3).
- Diagonal TV: 65% owned by Endemol, for the two seasons under study it produced more than 400 hours of programmes, such as *Ventdelplà* (TV3), *Amar en tiempos revueltos* (La Primera) and *De moda*, a series whose production also involved other channels that broadcast the programme, such as Canal 9, Telemadrid and ETB2.

• Grupo Zeta: one of the most important Catalan media groups, it has an audiovisual subsidiary, Zeta Audiovisual, which in the field of production operates under the commercial name of On TV. Its position was highly minority, as it only appeared in the second season analysed, producing a single programme, *Tele Objetivo* (La Primera), with a total duration of 12 hours.

• Lavinia: the group presided over by Antoni Esteve controls La Productora (now rechristened as Lavinia Productora), thereby starting operations in the areas of technology for television, local television services, auxiliary services, interactive communication, etc. All its productions were broadcast by Televisió de Catalunya (TVC), such as *La cuina de l'Isma* and *Sexes*.

• Boomerang TV: over the last few years this company, based in Madrid, has become one of the main producers in Spain via its parent company and a series of subsidiaries that it has gradually set up on the basis of a strategy of regionalisation, via which it has established itself in several autonomous regions, such as Catalonia, in this case with Veranda TV, a company founded in 2006 and which, in that year, participated in the production of *Polònia* (TV3) together with Can Cuca.

• Edipresse: via its Spanish subsidiary, Edipresse Hymsa, this Swiss group had a holding in the producer Multimedia Lua, presided over by Manuel Campo Vidal. This producer was responsible for the programme *Generación XXI* broadcast by several autonomous channels. At the time this study ended, at the end of 2006, the merger between Edipresse Hymsa and the publishing group RBA had also affected its control over Multimedia Lua,

**5** "Telefónica vende Endemol al consorcio de Mediaset por 2.629 millones", *El País*, 14 May 2007. <http://www.elpais.com/articulo/economia/Telefonica/vende/Endemol/consorcio/Mediaset/2629/millones/elpepueco/20070514elpepueco_5/Tes> (last consulted: 10 June 2008).

**6** "RBA y Edipresse se unen para crear el mayor grupo de revistas de España", *El Mundo*, 28 November 2006. <http://www.elmundo.es/elmundo/2006/11/27/comunicacion/1164650586.html> [last consulted: 14 June 2008].

which passed into the hands of the new company.[6]

To these media groups we should also add a seventh, Vértice 360º: born at the end of 2006 (and therefore after the data in our analysis) around the telecom and IT group Avánzit. This company controlled the Barcelona producer Notro Films, which appeared in the second season analysed with almost 100 hours of content broadcast.

In total, in 2004/2005 the Catalan producers belonging to media groups produced 1,732.22 hours, or 69.62%. In the following season, the number of hours increased to 2,233.39, accounting for 69.61%, which did not include the percentage of Notro Films, as it was not a formal part of a group at that time. So the market share available for producers organically independent from groups remained at around 30%.

In spite of this significant presence, most of the producers identified are really independent and go to make up a sector that could be characterised by its atomisation. The great exception to this rule is El Terrat, ranked among the most important producers in Catalonia (and in Spain as a whole) without compromising its independence in terms of share ownership.

## The markets for Catalan production

The ranking of channels buying from Catalan independent production varies quite a lot between 2004/2005 and 2005/2006, the season in which the two new companies appearing on the free-to-view Spanish TV scene became important, Cuatro and laSexta (Table 3).

In both seasons, a great demand can be observed on the part of state-wide television companies, especially Telecinco and Antena 3 TV in the first season and Cuatro and La Primera in the second. TV3 remains in third position in number of hours but leads in number of programmes, which rises almost 50% between the two years (from 19 to 28). As already mentioned, the growth in the number of total hours is very large (727.02) but it is a lower figure than the 986.38 hours broadcast by the two new channels on the market, Cuatro and laSexta. In their first (incomplete) season, they already accounted for 30.68% of all Catalan independent production.

The appearance of these two companies involved significant reductions in the number of hours (and slightly in the number of programmes, from 13 to 11) bought by Telecinco and Antena 3 TV, who stopped broadcasting 239.99 and 205.17 hours respectively, with percentage losses of 44.59% and 48.93% compared with the volume for 2004/2005. In absolute figures, however, the biggest loss was for Canal Sur, which in 2004/2005 was the fourth buyer with 344.93 hours corresponding to three different programmes (*Me lo dices o me lo cuentas*, by El Terrat, *Generación XXI* by Multimedia Lua and especially *Andalucía directo* by Mediapro) and which didn't broadcast a single minute of Catalan production in the following season. In general, losses can be seen in sales to autonomous community TV channels outside Catalonia, among which only Castile-La Mancha Televisión (CMT) increases, while other clients such as Canal Sur Televisión, Televisión de Galicia and Televisión de Canarias disappear.

Apart from the new buyers, on the positive side for producers we must also count the rise in hours broadcast by La Primera and TV3. The former rose 463.18 hours, totalling 609 (+317.64%) and the latter rose 174.73 hours, totalling 545.93 (+47.07%).

If we group together the markets for Catalan independent productions, we can see that most are concentrated in state-wide television companies: 50.94% in the first season and 71.50% in the second (graph 1). TVC broadcast around a fifth of the total production, while the different autonomous community markets (those of autonomous public TV channels belonging to FORTA) fell drastically in the second season, analysed both in terms of volume and in the number of channels. If in 2004/2005 Catalan productions were premiered on 9 TV channels from 7 different autonomous communities, in 2005/2006 this figure fell to 5 channels from 4 communities. In terms of percentage of hours, this goes from 30.20% to 7.40%, approximately one quarter.

A more accurate analysis of the data is provided by the social network analysis (SNA) methodology, which attempts to establish relations between different elements of a system. In this case, Catalan producers and television companies at the level of state and autonomous region. With the UCINET 6 programs (Borgatti, Everett, Freeman, 2002) and based on the specifications contained in Fernández Quijada (2007), first a matrix of independent producers and TV

**Table 3. Destination of Catalan independent production**

| 2004/2005 | | | | | 2005/2006 | | | |
|---|---|---|---|---|---|---|---|---|
| **Channels** | **No.** | **Hours** | **%** | | **Channels** | **No.** | **Hours** | **%** |
| Telecinco | 5 | 538.17 | 21.63 | 1 | Cuatro | 14 | 630.28 | 19.60 |
| Antena 3 TV | 8 | 419.30 | 16.85 | 2 | TVE-1 | 9 | 609 | 18.94 |
| TV3 | 19 | 371.20 | 14.92 | 3 | TV3 | 28 | 545.93 | 16.98 |
| Canal Sur | 3 | 344.93 | 13.86 | 4 | laSexta | 12 | 356.10 | 11.08 |
| CMT | 2 | 184.68 | 7.42 | 5 | Telecinco | 6 | 298.18 | 9.27 |
| La 2 | 6 | 164.12 | 6.60 | 6 | Antena 3 TV | 5 | 214.13 | 6.66 |
| TVE-1 | 4 | 145.82 | 5.86 | 7 | La 2 | 6 | 192.72 | 5.99 |
| K3/33 | 4 | 98.02 | 3.94 | 8 | CMT | 2 | 192 | 5.97 |
| Punt 2 | 3 | 57.47 | 2.31 | 9 | K3/33 | 11 | 131.15 | 4.08 |
| ETB2 | 2 | 40.98 | 1.65 | 10 | Punt 2 | 2 | 16.17 | 0.50 |
| TV Canaria | 2 | 34.13 | 1.37 | 11 | Canal 9 | 2 | 13.77 | 0.43 |
| ETB1 | 1 | 31.13 | 1.25 | 12 | ETB1 | 1 | 9.72 | 0.30 |
| Telemadrid | 2 | 27.78 | 1.12 | 13 | Telemadrid | 1 | 5.77 | 0.18 |
| Canal 9 | 1 | 19.42 | 0.78 | 14 | | | | |
| Televisión de Galicia | 2 | 10.75 | 0.43 | 15 | | | | |
| **TOTAL** | | **2,487.90** | **100** | | **TOTAL** | | **3,214.92** | **100** |

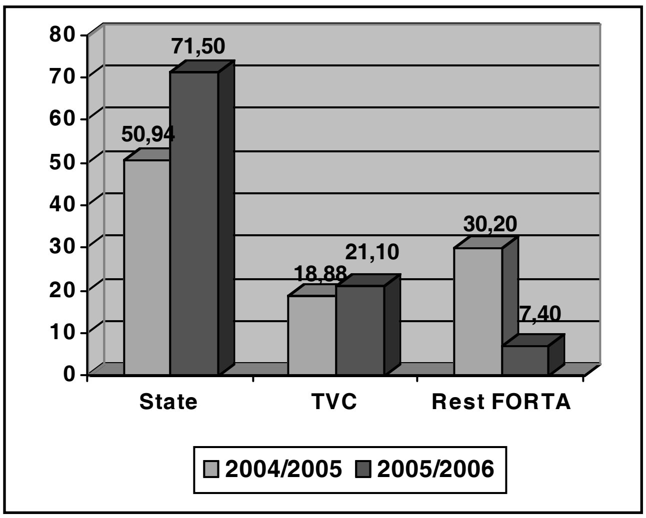
Source: author, produced from SABI and GECA data.

companies was constructed in order to graphically represent the whole of the system via sociograms.

The SNA of Catalan producers and their clients was quite complex for season 2004/2005, with a formation we might call a mesh (Figure 1). A significant group of producers was observed that depends on TV3, but the system as a whole was quite complex due to the relatively high number of parties involved and their network of relations. In total, there were 9 producers with no kind of link with TVC and depending totally on external markets, while another 6 worked there but not exclusively. A star-shape formation around TV3 was detected, typical of high dependence situations. In fact, there were 6 producers that only worked for the first Catalan autonomous community channel and three more did so exclusively for K3/33. The most diversified companies were Gestmusic and Mediapro, which worked for six and seven different channels, respectively.

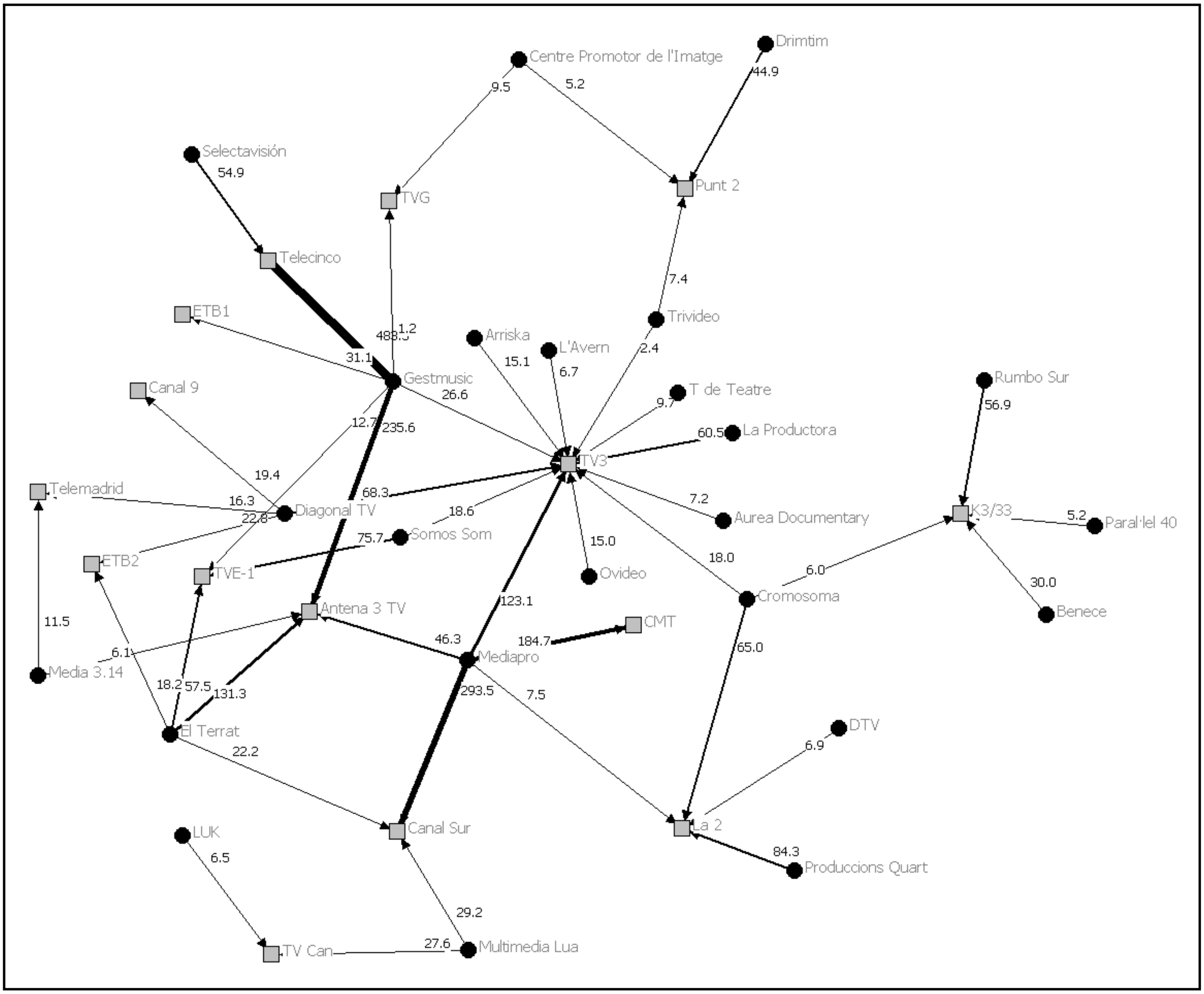
In the 2005/2006 season, the diagram of relations between producers and channels acquires a greater degree of

**Graph 1. Destination of Catalan independent production**




Source: author.

**Figure 1. Circulation of Catalan independent production (2004/2005, in hours)**




Source: author, based on GECA data.

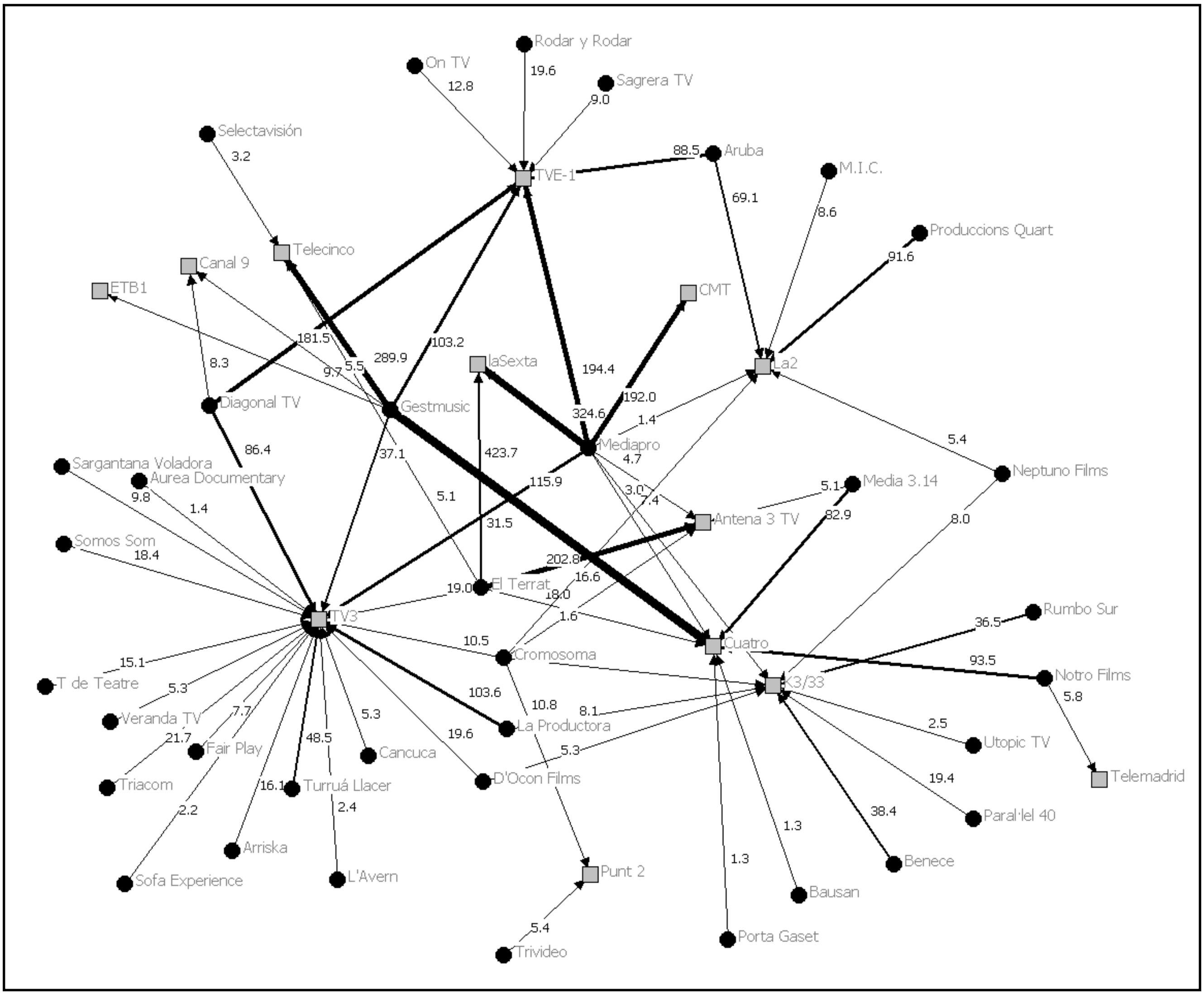
complexity due to the increase in the number of parties involved (Figure 2). The star formation around TV3 is much clearer due to the rise in the number of suppliers for the Catalan public channel: 12 producers worked only for this broadcaster.

The two most active companies are once again Mediapro, with 8 different clients, and Gestmusic, with 6. Together with Diagonal TV, Cromosoma and El Terrat go to make up the core of the system of producers, as they have the most diversified client portfolio, as reflected in their central position in the figure. With regard to the two new TV channels, opposite behaviours can be observed. In spite of the high volume of hours bought, laSexta only buys from Mediapro and El Terrat, which form part of its shareholders. Cuatro, on the other hand, bought from a total of 7 Catalan producers.

## The role of Televisió de Catalunya

In Spain as a whole, the different public TV channels from the autonomous communities usually provide the basic support for regional broadcasting (Fernández Quijada 2007).

**Figure 2. Circulation of Catalan independent production (2005/2006, in hours)**




Source: author, based on GECA data.

However, in the case of Catalonia, this statement must be qualified. Since it started, TVC has been characterised by an internal structure of large dimensions that reproduces the European model of large state-owned public channels in times of monopoly. The purchase of external production has not been a priority and this has placed it at the bottom of the ranking in Spain in this area. In the season 2004/2005 its two channels broadcast 475.79 hours of external production (2.64% of the Spanish total), the lowest figure of all the autonomous community and state channels after Canal +, which didn't buy a single minute externally. One year later, the number had risen to 680.47 hours (3.5% of the total), although it remained among the television channels with the least hours of independent production broadcast. This limited volume externalised is almost totally reserved for Catalan producers, which in 2004/2005 absorbed 98.62% of the total. Only one Madrid producer, Four Luck Banana (*Idèntics*, on TV3), and another from Valencia, Conta Conta Produccions (*Auto in definits*, on TV3), had access to TVC's programming. One year later, only Sony TV, subsidiary of the multinational Sony Pictures and based in Madrid, found a spot in its broadcasts with the programme *Il·lusionadors*

(TV3), while the remaining 99.50% went to Catalan producers.

There are two significant explanations among all those possible for the problems encountered by producers from other autonomous communities in accessing the TVC market. Firstly, the existence of a robust autonomous industry that makes it difficult for other regions to break in. Secondly, the use of Catalan as the language in all TVC broadcasts represents a barrier for some producers outside Catalan-speaking areas.

In any case, the importance of TVC for Catalan producers is related to the number of programmes rather than the volume of hours, as it is the channel that works with the most autonomous community producers: 15 in 2004/2005 and 24 in 2005/2006.

## Conclusions

The sector of independent TV production in Catalonia is dynamic and growing. Catalan companies have made the most of the arrival of two new free-to-view TV channels, significantly increasing their sales in the first season of operation for these channels. There are also negative aspects, such as the attitude of laSexta, which focuses its associated production policy on producers that form part of its group, with few exceptions in Spain as a whole.

Also evident in this initial interpretation of the data from the season 2005/2006 is the ground that Catalan companies have lost in other spheres, especially in the different autonomous community TV channels apart from TVC: the closeness of local producers, which are developing in all communities and whose only market, in many cases, is their own region, has led to a rise in competition that, for the moment, Catalan audiovisual businessmen have suffered from.

In fact, this is what is happening with TVC. Its associated production volume is small compared with other Spanish channels but it favours producers from its own region, in some cases leading to excessive dependence on a single client. In any case, TVC's support for the industry requires a further study that also includes support for the film industry or the new windows and technologies that permit digitalisation (Prado and Fernández 2006). The role played by the large groups in configuring the independent production market should also be studied. Lastly, the trend to create media groups is becoming more acute, a fact that, together with the little regulatory clarity for the area of independent production, has allowed them to take up positions at a time when the sector seems to be reaching maturity. The trend towards concentration is a fertile area in this context, as can be deduced from the position in Catalonia of Mediapro or Endemol, companies that hold an interest in broadcasting via laSexta and Telecinco. In any case, we would also need to see how much of the market remains for truly independent producers.

The upcoming terrestrial digital television represents a source of concern but also of hope for many of these businesses. The number of potential clients will multiply but, at the same time, fragmentation will probably lead to a reduction in the budgets available. In this respect, having good access to the state market, which is able to pay a higher price for its programmes, would be a good asset for companies.

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