

An analysis of television in Spain from the private sector

CENTRO INTERNACIONAL DE LAS EMPRESAS DE COMUNICACIÓN (cood.). *La televisión en España: informe 2007*. (Television in Spain: 2007 report) Barcelona: Ediciones Deusto, 2007. 283 p.

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From four years ago up to 2007, the Union of Associated Commercial Television Companies (UTECA in Spanish) used to publish two annual reports on the private television sector in Spain. One of a legal nature, directed by professor Santiago Muñoz Machado, and another economic, by Luis Jiménez, partner in Deloitte and in charge of the media industry in Spain and Europe.

The novelty of the work we are reviewing lies not only in the fact that it unifies these two studies but also extends and frames them within the coordinates with which we must judge the *status quaestionis* of a medium or of any economic situation, i.e. the television market, demand, advertising, content or positioning strategies.

This is not a market or audience study in vogue, nor merely a monograph defending the interests of the UTECA audiovisual industries, but rather both these objectives are exceeded thanks to the scientific and editorial direction of the International Centre of Communication Companies (CIEC in Spanish), an initiative of IESE Business School and of the Communication Faculty of Navarre.

The perspective proposed by CIEC and the report's coordinators (Juan Pablo Artero, José Ignacio Bel, Alfonso Sánchez-Tabernero and Juan Manuel de Toro) is, as stated by Ignacio Bel in the introduction, "the need to analyse the situation further and, based on this, to establish proposals for the future that allow us to rationalise this activity as far as possible, in which the co-existence of the public and the private is required, based on mutual respect and especially on the subsidiary function of the state in a free market society such as that of our Constitution" (page 7).

Without doubt, this book contains the claims of associated private television companies (the six free national channels: Antena 3 TV, Telecinco, Cuatro, Veo TV, Net TV and laSex-

ta) and defends the elimination of barriers to advertising competition in the implementation of TDT and within the legal framework. All without losing sight of private television's main rival in terms of audience and particularly advertising: public television. Not only RTVE's two public channels but also the public channels of the autonomous regions, which in 2006 totalled 38% of the audience share.

The main aim of this book is to provide a study of the economics and content of open and free private television. It also provides a legal analysis of the regulation of private television in Spain in 2007, and particularly focuses on the evolution of legislation and the functioning of bills, as well as the implementation of legislation affecting this sector, and is completed with a series of articles and reports on positioning strategies, audience fragmentation and new types of television business.

The first two chapters analyse the current types of television channels, of note being the figures for the main TV landmarks in Spain, as well as a study of digital television platforms: satellite, cable, TDT, ADSL and mobile TDT. The television offered by telecom operators (Jazztel TV, Imagenio and Orange) adds a new business model that "telecos" are fighting to extend within the sphere of mobility, i.e. the idea of an operator that also distributes content.

Opposing this is the radio broadcasting model, which is the "media" model in which the media rather than operators prevail, and is the option chosen by the Impulse plan to promote the implementation of TDT, with the approval of the television companies.

Television consumption is also studied in depth with data cross-referenced from different sources (TN Sofres, Carat, INE) which the authors used to obtain the profile of age groups and timebands for television. The main observations are: the consumption of generalist TV accounts for almost 50% of the whole audience, two points more than in 1997. TVE is the television company that has lost the most ground, together with La 2, benefitting new operators (laSexta, Cuatro and others). Another clear idea that seems to denote a trend: the only target age group that is falling and leaving television is young people; children from 4 to 12 by 12% and those aged from 13 to 24 by 9%.

As a complement, in this book there are also two chapters by renowned authors in the area of information law (such as Leopoldo Abad), audiovisual ethics (such as Mónica

Codina), and experts in the news business. Of all these, I should like to highlight that of lecturers Mercedes Medina and Mónica Herrero, who introduce the strategic challenges for leadership in the audiovisual industry. For them “the initiative for content seems to continue to lie with the channels, which have found in mobiles and the internet another medium in which to disseminate their programmes while there is no other content provider to take over this leadership. There are possibilities to exploit the same content from the conventional programming grid on other media. This successful content coincides with content that triumphs on commercial channels. However, the internet, mobiles or other media allow value added content to be developed that is received only on these media and not on television” (page 265).

This context of the immediate future of television (with a place for IPTV, DVR and web TV) is also that used by the European Commission in the directive that was finally passed on 29 November 2007, after this report was published. That day in Strasbourg, the new directive was passed that has replaced the one from 1997. Its classic name of Television without Frontiers has become the Audiovisual Media Services Directive. ‘Audiovisual’ and not ‘Television’, so that non-linear services, i.e. those that don’t “broadcast” or “push” content to viewers, have now become a part of the audiovisual panorama.

As indicated at the beginning by the coordinators, this book does not take the place of other, long-standing and high quality industry reports produced in Spain but certainly, from my point of view, there is no other as complete from the point of view of private television, especially when there are only two years to go before the digital switchover.