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Radio, a Medium in Transformation

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Presentation

Radio is undergoing a very extensive and profound process of transformation. The impact that new digital technologies, transmission networks and sound media/communications services will have on areas of activity and expression pertaining to traditional radio is expected to be just as, if not more, important than on the press and television. As a medium, radio's organisation and programming models, languages, contents and uses, are on the threshold of initiating changes that may raise expectations of creativity and expansion -but there are also many question marks and doubts hanging over them. These doubts include, for example, the adaptation of regulatory environments, the market availability of digital receivers and questions about business opportunities. This issue of *Quaderns del CAC* presents a brief look at the issue of radio transformation in Europe, Spain and Catalonia, and offers different opinions on its evolution over the coming years.

The issue is structured from the most general observation through to the most specific. The article by María del Pilar Martínez-Costa ("Digital Radio") takes a detailed and documented look at the unequal status of digitalisation in Europe, focusing particularly on some of the pioneering countries, with references to the international reality and the situation in the United States and Canada. Carmen Peñafiel applies the same approach but centres on the different digitalisation speeds across Spain in the second article ("Both Sides of the Digital Radio Question"). It is followed by different assessments on the prospects of digital radio in Fernando Rodríguez Madero's article "A Sector Analysis of Digital Radio". Josep Maria Martí tackles the issue from the point of view of programming and describes and evaluates the current situation of radio in Catalonia ("The Radio Supply in Catalonia: Between Maturity and Crisis"). Montserrat Bonet focuses on the elements of uncertainty facing local radio in Catalonia ("Who's Afraid of Local Radio?") and Joan M. Corbella closes the issue with a systematic analysis ("Radio in Catalonia: Uses and Perceptions") of the results of the CAC survey of October 2003 on the perceptions and preferences of radio listeners in Catalonia.

Finally, this issue includes three contributions in the "Observatory" section. The first is an extensive general view of international initiatives promoted by the UNESCO in defence of cultural diversity, by Martí Petit ("The International Convention on Cultural Diversity (UNESCO): Context, Evolution and Perspectives"). The second is an assessment report on the first 10 years of the Barcelona independent film festival L'Alternativa, by Fran Benavente ("Ten Years of L'Alternativa, the Independent Film Festival of Barcelona: The Aesthetics of Resistance"). Finally, Anna Estrada looks at a study the CAC commissioned on the quality of the Catalan language on television ("The Quality of the Catalan Language Used on TV").

Josep Gifreu
Director

Digital Radio in Europe

María del Pilar Martínez-Costa

- *Although it does not enjoy a great deal of popularity in Spain, digital radio is a reality on the European radio market. The concept of digital radio is not limited to introducing the DAB (Digital Audio Broadcasting) system developed by Europe but also includes other systems of production, distribution and reception. Digital radio uses the Eureka 147 DAB system as well as cable, terrestrial digital television and satellite TV, the generation of UMTS mobile telephony, satellite and Internet digital-radio systems, and all without abandoning the traditional supports of FM, MW and SW, which are already testing signal-digitalisation systems. Far from being a strictly technical question limited to signal quality, digital radio is diversifying and increasing the number of distribution channels (including new content other than sound) and creating different ways to dialogue with audiences. It is thus changing the traditional broadcasting model and throwing up major challenges in the field of content and radio-company management.*

Introduction

At the State level, digital radio does not enjoy a great deal of popularity among either radio journalists or stations. Rather, there are major obstacles to recognising it as the price radio has to pay to remain on the new competitive media market that features the convergence of all digital

supports. The need to uphold market balance, even though this concept has often been questioned by audiences, has meant that traditional radio stations have failed to throw their weight decisively behind digital conversion.

The very thing that was once a byword for progress and modernity now appears to be a utopia of complicated execution in Spain. However, digital radio on other markets is already an indisputable reality. Furthermore, it does not stop with the introduction of the DAB system developed by Europe but includes other systems of production, distribution and reception. Broadly speaking, we could say that we are witnessing the configuration of a new concept of radio. Whoever fails to recognise this now will have serious difficulties in meeting the quality, new-service and interactivity demands of an audience which in ten years from now will have effortlessly incorporated the digital era into their daily consumption routines.

Radio in the New Digital Environment

To understand the scope of the technological, cultural and social convergence we are currently experiencing, it is important to point out that, in a digital environment, radio radically changes regular communication conditions. Firstly, the possibilities for broadcasting using supports other than electromagnetic ones are multiplied. Radio is also beginning to design and manage content that includes text, graphics, images and interaction possibilities. At the same time, it is establishing different forms of production, dissemination, access and consumption of messages. Therefore, when we talk about digital radio we are referring to a radio that is taking on the peculiarities of digital systems and subsequently diversifying and increasing the number of distribution channels (including new content other than

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sound) and creating different ways to dialogue with audiences. Let's look at what it all means.

In the new digital environment, distribution supports multiply and are no longer the scarce resource that justified the birth and consolidation of public broadcasting systems in Europe. A process of complementarity and diversity of supports occurs which makes it possible to use channels other than the electromagnetic spectrum, which has been the regular one to date. Digital radio uses the Eureka 147 DAB (Digital Audio Broadcasting) system as well as cable, terrestrial and satellite digital television, the generation of UMTS mobile telephony and Internet and satellite-based digital radio. All this, without abandoning the traditional supports, which are exploring ways to digitalise FM signals through the IBOC (In Band On Channel) system and AM (Amplitude Modulation) and SW (Short Wave) through the DRM (Digital Radio Mondiale) system.

With regard to language, another feature of a digital environment is that it combines different communicative dimensions. Radio that speaks only with sound becomes a multimedia support. It is "radio that reads and sees", as other authors have commented. Other services and sounds apart from radio in the traditional sense of the term appear. Production processes are modified and the possibilities of distributing them are multiplied. Digital radio is no longer sound radio and is integrated with other, complementary languages. It is integrated in a new modality of exhibiting its programmes different to the *here* and *now* of traditional radio and at the same time opens the door to new forms of narration in which it is complemented with other content.

The traditional communication model of radio is also modified. A non-mass, specialised and personalised model is established with different levels of interactivity on demand, in which a diachronic and successive reading becomes possible. We could say that the way of making and consuming radio is changing. The Internet is the laboratory where experiments are made and possibilities developed today. However, technological development means that within a decade this will be possible on other supports.

This new environment, characterised by a diversity of supports and content and the implementation of a new model for consuming or listening to the radio changes the dynamics of frequency management, production rates and content management, strategies for capturing new listeners

and the powers and alliances established among media organisations. To date, traditional media divided up a market, while now they come together on identical stages and are forced to diversify their core business to survive.

The Current Situation of DAB Radio

The process of digitalising radio's electromagnetic support does not begin and end with the development of the European system known as Eureka 147 DAB. However, DAB is the most revolutionary and complete system in the attempt to digitalise traditional radio and is considered the first big technological change in radio since the appearance of FM, stereophony and transistors.

Europe has been the main promoter of the DAB system, which began in 1986 with the support of the European Broadcasting Union (EBU). The aim was to develop a way to broadcast radio signals that would make it possible to prevent interference from MW and FM bands, extend transmission possibilities in a saturated spectrum and improve signal quality and stability, particularly in terms of mobile reception.

The period of technical development of the new system was completed in 1995 when the European Telecommunications Standard Institute (ETSI) adopted the DAB system as the only European standard¹. Technical efforts since 1995 have focused on obtaining accessibly priced and easy-to-use receivers and the integration of DAB with other multimedia applications and digital supports. A number of technical adaptations aimed at converging with the MP2 and MP3 digital-compression systems and the reception interfaces of digital television and personal computers have been made. In April 2004, the company Microsoft Corp. announced it was joining the WorldDAB Forum to speed along the development of new services. DAB is also expected to integrate with mobile telephony. To that end, the WorldDAB Forum has begun to take part in telecommunications congresses and fairs where developments in telephony services are discussed and presented.

DAB has a number of conditions that are particularly attractive to European radio, which, because of its geography, extension and location, is suffering from a saturated spectrum and has many difficulties with regard to

mobile broadcasts. Compared to traditional MW and FM systems, DAB offers a technically high-quality signal, reception free from interferences, mobile and portable reception, improved use of the spectrum, compatibility in the use of terrestrial and satellite systems, use of a lower-strength transmission, increased number of programmes, simple receivers compatible with other digital systems and the ability to disseminate images, graphics, text and, very soon, video services as well as services added to the principal programme.

Because it includes complementary and value-added services, DAB digital radio breaks with models based on station programming to give rise to programming techniques by channels. To the principal programme we can add adjacent channels, not just with data, images and graphics, but also audio, so that it is possible to offer other services, including listening to live broadcasts of parliamentary debates, showing all the messages that listeners leave on answering machines, accessing complete versions of interviews, etc.

Despite these advantages, which ensure DAB a speedy success, and the fact the many countries have adopted it as their technical standard, the implementation process has been laborious and complicated, basically for three reasons. Firstly, it requires awarding new Band III (174 to 274 MHz) and L-band (470 to 3100 MHz) licences, which means that some countries have had to readjust the distribution of a part of the spectrum that was previously being used for other services. Furthermore, the first licences awarded by the International Telecommunications Union (ITU) were not extensive enough, particularly for European countries with a long history of commercial radio such as Spain. Secondly, national governments have needlessly delayed the timetable for the introduction of DAB and have been excessively conservative when it comes to planning the regulatory framework, thus discouraging broadcasters from starting on the road towards digitalisation. Thirdly, once the debate about the complementarity of traditional systems and DAB had drawn to a close, the price reduction for the new receivers the system requires and the creation of a real market have still to be provided with a successful strategy.

By the mid-1990s, Europe was establishing forums to develop digital radio in an attempt to address these problems and promote the system in the different countries.

Although they had different structures and names, the goals and functions were similar: to follow DAB's evolution on the international scale, generate a favourable opinion among future users, define the new services to provide, obtain more radioelectric resources and define the framework for introducing DAB in each country. Germany, France and the United Kingdom were the first to create these forums and working groups, followed by Italy, Spain and the other European countries. Meanwhile, the European Broadcasting Union promoted the establishment of the WorldDAB Forum (www.worlddab.org), which initially grouped together European countries only under the title EuroDAB Forum. The name was changed to WorldDAB in 1997 and brought together all the sectors interested in the development and implementation of DAB, from governments through to broadcasters and transmitter and receiver manufacturers. The WorldDAB Forum facilitates the exchange of information, the organisation of congresses, the preparation of technical reports and market surveys, the promotion of the system, the development of new services and research into ways that can make it possible to offer flexible and inexpensive receivers.

In the past decade, nearly all the European countries have established their regulatory frameworks, awarded frequencies to public and private broadcasters and planned how to establish transmission networks. Figures from the WorldDAB Forum suggest that DAB has a potential audience of 300 million people able to receive around 600 radio stations today, many of which simulcast analogue programming.

The struggle to obtain competitive coverage has begun, although it has still to be concluded. DAB now has a coverage of 80% in the United Kingdom and in Germany it exceeds 70%. The figure for Canada is 35% and Australia introduced the system in December 2003. Meanwhile, countries such as France and Spain have only managed to achieve a theoretical coverage of 25% and 50% respectively, as many of the transmitters installed are either inactive or transmit with a data and strength capacity greatly inferior to the one stipulated and desired. That is why the debate – which, in Spain at least, should focus exclusively on the availability of accessibly priced receivers for the audience and the development of new content and services – is currently facing a crisis of trust in the system itself.

Within Europe, the country that has most decisively and continuously supported the future of digital radio is the United Kingdom. The BBC began experimental broadcasts in 1997 and one year later the Radio Authority awarded seven DAB multiplexes for new broadcasters in the frequency spectrum ranging from 217.5 to 230 MHz. In a move aimed at stimulating this initial distribution, the Radio Authority agreed that DAB licences would be granted for 12 years, automatically renewable to 24. At the same time, broadcasters who already had radioelectric frequencies on the AM and FM bands would have licences granted when they requested a digital radio frequency.

Because the private radio groups in the United Kingdom were still consolidating after the break up of the public radio monopoly, it was not hard to reach the consensus needed for the distribution of frequency blocks. One multiplex was awarded to national BBC programmes and another to Digital One, the multiplex that brings together the national commercial stations. The five remaining blocks were reserved for public and private regional and local broadcasters that had properly completed the implementation schedule.

With regard to programming, public radio began with transmitting its national channels: the youth station BBC 1, the popular BBC 2, the classical and cultural station BBC 3, the full-service BBC 4 and the news/sports station BBC 5 Live. Today, as well as the five traditional stations and the new format Five Life Sports Extra, the BBC has used DAB to launch a further three stations: BBC 1XTRA, specialising in black music; BBC 6 Music, which plays pop from the past 30 years; and BBC 7, a station that specialises in entertainment, comedy, drama, literature and children's programmes. It also uses DAB and the Internet to provide access to the complete programming of the BBC World Service and British Asian Network.

For its part, Digital One includes the UK's biggest private radio group, GWR and the terrestrial network operator, NTL. It first began DAB broadcasts in November 1999. Initially they simply simulcast the content of the national networks Classic FM, Virgin and Talk Radio, but soon went on to develop DAB content. First was the station The Core, with a CHR (Contemporary Hits Radio) format for teenagers and the under 25s, followed by Planet Rock, specialising in classic rock music. The next cab off the rank was The Mix,

an AC (Adult Contemporary) format of Live Digital Radio, followed by the specialised culture station Oneworld, the EL (Easy Listening) format of Prime Time Radio, the ITN all-news station, Talk Sport and the economic and financial news station Bloomberg Talk Money. In the past year it has added the specialist stations Student Broadcast Networks, Passion For London, ChoiceFM and Purple Radio².

As the UK case has shown, both public and private radio stations have supported the development of new content for digital radio, seeking specialisation in talk issues and music styles. Services and information and graphics stations have not enjoyed the same development. In these cases, they only include additional programming information (station ID, scheduling information, etc.) and traffic and weather information for drivers. The BBC's data service station is called BBC Vision Radio, while Digital One has an experimental interactive service called Digizone, which includes games, news headlines and information about the music stations.

From the outset, British broadcasters were aware that the real battle in implementing the system would be to win listeners over to digital radio. It tackled this challenge with an effective marketing plan that sped up access and availability to the technology. The Digital Radio Development Bureau (DRDB) was established in March 2001 whereby national and local public and private radio stations could join forces to meet this goal. The publicity campaign and sale of DAB receivers at the accessible price of £99 carried out in December the same year was very successful. It was the first concrete industry initiative to popularise the new system and showed receiver manufacturers that the market was interested in DAB and its value-added products if the price of receivers could be brought down considerably. The campaign was first carried out in London, extended throughout 2002 to the main UK cities with similar success and repeated during the last Christmas period. The promotional activity included the regular realisation of competitions with prizes that included a DAB receiver, the publication of listener magazines, the development of EPGs (Electronic Programme Guides), which until the end of 2004 arrived over the DAB signal, and the maintenance of a database that systematised listening habits and regular email consultations from over 5,000 listeners.

In March 2004, the DRDB had sales figures of half a million DAB receivers and estimated they would double by

the end of the year. In fact, the organisation that researches radio audiences, RAJAR (Radio Joint Audience Research), has included audience figures from DAB broadcasters since the first quarter of 2003. Although the audience share it won in the last quarter of 2003 was only slightly over 1%, it is still an encouraging figure bearing in mind the number of receivers available at the time.

Germany, together with France, was the main promoter of DAB during the research period. Digital radio transmission began in 1999 and today includes more than 150 broadcasters across the country. 40% of them offer exclusive content for the new support, while the remaining 60% simulcast analogue programmes. The planning of the DAB spectrum is up to each federal state and the granting of licences carried out to date has allowed the appearance of new broadcasters. Since May 2001, Initiative Marketing Digital Radio (IMDR) has promoted the system by procuring to combine forces with industry, government and broadcasters. It also assesses the viability of an analogue switch-off that will force all the radio stations to digitalise within 10 years.

In Spain, the first pilot experiments in DAB began in 1998. The National Digital Broadcasting Technical Plan, which awarded the first national licences, was established a year later. The six multiplexes available were distributed as follows: three national multiplexes to the public and private stations with a total of 18 programmes, two multiplexes for autonomous-community and regional broadcasters and one for local broadcasters. Coverage currently stands at around 50%, according to the national network operator Retevisión and the operators in the autonomous communities. However, many of the services are not operative, do not transmit with the data capacity or strength awarded and the adjustments of data stations – where they exist – are confusing and permanent. Content is fundamentally simulcasts from the analogue broadcasters. Radio Nacional de España simulcasts the four national stations and the Radio Exterior service across Europe. The private stations Onda Cero Radio, SER, COPE, Radio España and Intereconomía do the same. The remaining licence holders, El Mundo, Radio Marca, Onda Rambla-Planeta, the Godó group (which broadcasts M80 Digital), Quiero Radio, Punto Radio de Prensa Española and the Vocento group include music broadcasts and the odd specific content developed

for other digital supports, in particular the Internet and the postponed and controversial digital terrestrial television.

The situation in the autonomous communities is pretty much the same. Catalonia, the Basque Country and Galicia have led the charge with regards DAB broadcasters. Catalonia has awarded a total of 48 local and provincial licences to date and carried out a number of informational and promotional campaigns about DAB, in which it has given away 500 receivers.

Although the Forum for the Development of Digital Radio was established in April 1997 and was very active during the period of technical experimentation, it quickly lost its way in promoting the system, bringing down the price of receivers and developing new content. This means that the situation in Spain is slightly more pessimistic, at least among the broadcasters of the traditional stations, who are not disposed to break the current balance of national and local markets that are still returning positive results.

National timetables aside, in general terms we can say that the introduction of DAB digital radio is now facing three challenges: consolidating real coverage, extending the content and service supply and capturing audiences. It will only be possible to reach stable goals if the steps followed form part of an overall strategy that facilitates the integration of all the digital supports of the new radio being developed.

Other Systems of Digital Radio: the Digitalisation of MW and FM and Satellite Digital Radio

The digital radio environment does not end with the introduction of DAB. In the past decade, technical efforts have been made to digitalise MW, SW and FM in the short term and to make the most of the signal distribution of satellite systems.

In 1997, the United States authorised two nation-wide S-DAB (satellite digital-radio) licences, i.e., XM Radio and Sirius Radio. They have a national coverage and work on a subscription basis, offering over 200 mainly music stations. However, they also include news and sports stations in virtue of the redistribution agreements they established with USA Today, the BBC World Service, PBS, Bloomberg News, CNN News, The Weather Channel, etc.

Because they were pay stations, the added value offered

to subscribers (for an average price of \$10-14/month) consisted of maintaining updated music lists, the use of DJs with a very good knowledge of the music genres they presented, and not having advertising (except for sponsorship, the main source of funding)³.

The authorisation of these S-DAB frequencies with a national coverage across the US was of an experimental nature. Depending on how market acceptance went, the FCC (Federal Communications Commission) hoped to obtain data on the changes that would be involved with authorising a greater number of digital-radio frequencies of a national coverage on a basically local market.

With regard to terrestrial digital radio, in early 2003 the FCC authorised the adoption of the IBOC (In Band On Channel) system to digitalise the current FM and AM signal carriers. Under the names HD Radio and AM IBOC, the company iBiquity Digital Corporation developed a system of digital radio for the traditional electromagnetic spectrum without modifying consumption habits, market conditions or current content. These conditions were very advantageous to receiver manufacturers, broadcasters and audiences, who did not have to change frequencies or spend a lot of money updating existing technology. The system included the development of associated text and data services that would make it possible to identify new listener requirements. Although it still needs some technical adjustments relating to protecting the signal from interference from other transmitters, more than 100 broadcasters have adopted the system on an experimental basis in the US.

DRM (Digital Radio Mondiale) was developed in 1998 to work on the digitalisation of SW and MW. Five years later, the group had tested and standardised a digital-radio system for these frequency bands. A group of 80 broadcasters, network operators, receiver and transmitter manufacturers and the governments from 27 countries took part in the consortium. The system includes the development of data and text channels and can be received on fixed, mobile, portable and PC receivers. It was approved by the ETSI in September 2001 and various tests and demonstrations have been made at international forums. The official industry presentation took place in June 2003. In August that year, the WorldDAB Forum and the DRM consortium announced they would work together on developing receivers and services common to the two

systems, as they had arrived at the conclusion that they were complementary technologies. By January 2004, a total of 60 stations had begun to run test broadcasts with the system. Although a number of receiver prototypes have been developed, neither competitive market prices nor equipment that will also be compatible with other digital systems are expected before the end of 2005.

The Internet as a Content and Interactive Services Laboratory

Although the sphere for developing radio technology has always been the electromagnetic spectrum, radio cannot reject other digital supports and media, as they all tend to converge in the common environment described above.

As a starting point, the Internet cannot be considered a direct competitor of either traditional radio or DAB digital radio. The Internet is a new support that facilitates the digital integration of radio and the supply of new services. When people talk about online radio today, it is important to understand that it concerns a new form of communication rather than just a new support. The principal and traditional programme broadcast in real time is complemented online with other, new audio services, called side channels, with a new way of showing the principal channel and different ways of narrating sound. It is clear that online radio is a concept that transcends traditional radio. It is traditional radio as a basic concept of sound communication and a great many added values that can be accessed on the Internet, on DAB and on a range of digital supports.

Radio is no longer defined by its basic technical support or the technology it is built on, and imposes a concept based on content and functions: radio is not defined by technique but rather by supply.

Even if the Internet is not the only manifestation of digital radio and its features are not exclusive, it does have a number of significant advantages over radio. Firstly, it has a global scope that makes it possible to access international coverage without additional technical infrastructure. Furthermore, the process of implementation on the Internet and online radio have been much faster than in the other digital supports. The Internet modified radio's traditional communication model and made it personal, interactive and

on-demand, allowing a new packaging of products no longer limited to sound but which can be understood as added services of data, images, graphics and videos.

From the point of view of the message, the Internet also makes it possible to go beyond the concept of the *volatility* of the radio discourse because it enables content from different radio programmes to be recovered in times other than real time. We could say that the Internet puts a stop to the *fleetingness* of radio: the order and synchronic time of its narrative sequence, characterised by the *here and now* is broken with the diachronic consumption made in deferred time and in a selective fashion.

Information on the Internet is presented in a non-hierarchical, interactive and hypertext fashion and permits increased audience involvement, which means it is possible to personalise consumption. It thus facilitates the delimitation of audiences for a better financial return and impact for advertisers and promotes the business extension of radio now aimed at sound, particularly the music business.

In terms of making the most of the interactive resources that the Internet offers, the main marketing and communication tools employed with users are email, chat rooms, discussion forums and distribution lists that allow multiple options, including information requests, opinions, participation in competitions or voting, through to the exchange of data and files between users. Radio has to make the most of this effective instrument for interacting with listeners and profiling programmes more in line with new listener demands.

Although the phenomenon is on the rise and the advantages are clear and numerous, it would be wise to sound a note of caution about using online radio. This is mainly because, after a speedy implementation process in developed regions, where between 60% and 80% of the population has access, the Internet continues to be a scarce resource in other regions of the world, with a penetration of just 1%. Furthermore, signal quality is still not as good as the sound quality offered by FM, although the response capacity is conditioned by the features of the user's computer and software and the transmission speed of the phone line, at least until broadband becomes more generalised.

With regard to reception, the simultaneous and global audiences are usually reduced in line with Internet capacity,

bringing radio back into a fixed and non-portable environment. To date, European broadcasters have not awarded commercial viability to the Internet: despite the rise in the number of surfers consulting websites and the growth in the on-demand radio and music trade, radio stations still don't see it as a good business.

With these advantages and disadvantages, the truth is that the Internet is now being used as a test platform. In the US and Europe, both public and private radio stations use the Internet as a laboratory and testing ground for the presentation of new formats and the development of multimedia services.

Although the basic product of online radio often continues to be antenna sound, it is not limited to transferring existing content and formats. Online radio makes it possible to identify new formats by audience sections and to establish a new time cadence which corresponds to the new ways of listening to the radio. The Internet is thus installed as a device and a laboratory of specialised content which makes it possible to identify and trace new audiences shares while also helping consolidate station brands. It should not be understood just as a complementary support but also as a fundamental part of new content development and management strategies.

The Digital Radio Audience

From the early years of experimentation in digital radio, work was also done to identify the potential DAB market because there were doubts that there would be a real demand on the part of audiences. The first study prepared by the company Touche Ross & Co. in 1992, and the later reports commissioned by the EBU and the WorldDAB Forum in subsequent years, reflected that interest in the new technology was associated with the quality of the reception and absence of interference so long as it did not involve more than 10% in added cost.

These studies were done with samples of the population that had little information about the system and practically no experience as digital-radio listeners. However, when studies were done with qualified samples who knew about the technology and did have access, the figures changed radically in favour of digital radio.

The latest study prepared by British firm Continental Research into audiences found that digital-radio listeners were gradually abandoning analogue stations as they became more familiar with the new technology. The survey, published in the first quarter of 2004 was made with 502 people aged over 16 who had digital television and/or DAB receivers in their homes in the UK.

The study revealed that 68% of the people polled acknowledged having increased their listening time (TSL, Time Spent Listening) since having access to a digital-radio receiver. Two-thirds tuned in to the radio for 29 hours per week, 12 hours more than their previous listening habits. With regard to content, music programming and quality of the reception were the reasons behind the growth in listening time.

The same survey found that nearly 75% of the listeners in the sample consulted data stations, essential for discovering the name of the singer and track played and to obtain information about programming on the air. Digital-radio listeners said they had a satisfaction level of 94-98% with the quality of the reception, the range of programmes on offer and the facilities for finding the stations.

We can therefore say that, except for the pitfall of the availability of low-cost receivers, there is a potential market for the implementation of digital radio.

The Analogue Switch-off

Another burning question with regard the implementation of digital radio is the debate that has opened up around the possible analogue switch-off. Although some European countries mention dates beyond 2010 for transferring radio and television services to digital supports, it is not a question with an easy answer. To begin with, it is not possible to apply the same market logic for radio as for television.

A recent study by the European Commission (COM 2003, 541 final, 17 September 2003) found that the digital conversion of broadcast systems was a complex process with important economic and social implications not limited to a simple "technical migration".

The analysis is primarily political and it is in this area that the interests of each State run up against market demands. Although the advantages and needs for proceeding with the

analogue television switch-off are clear, the report found that the same criteria could not be applied to the case of radio. This was mainly because the radioelectric resources approved for digital radio, as I said earlier, are still too scarce to include the broadcasters currently operating in the various countries. Furthermore, Europe has failed to make tests or transmit on the authorised L-band, further limiting transmission possibilities.

The Key to Success

For now, success in implementing digital radio depends on overcoming the obstacles that were apparent in the mid-1990s.

With respect to DAB, it is necessary to have: authorisation for *more frequencies*, as the current ones are not enough; *flexible regulatory frameworks* that stimulate private and public initiatives, as the current ones are excessively bureaucratic; *broadcasters prepared to take risks* in developing new content and services and carrying out aggressive informational campaigns for audiences, as they have so far proved reluctant to invest in an uncertain future; and *receivers available at a low cost*, which integrate different digital possibilities and are easy to use, as for now they continue to be inaccessible. (Martínez-Costa 1997: 43 on).

With respect to the IBOC, HD Radio, DRM and S-DAB systems, it is necessary to successfully move beyond the current experimental stage in a way that ensures optimal technical conditions and complementarity among all the systems. Steps have already been taken in this direction; now the systems just have to mature and be brought technically into line with all the supports.

Online radio in Europe at least has failed to achieve a solid development. Using it as a laboratory and testing ground can help present new formats, develop multimedia services and delimit new audiences.

Having resolved the administrative and technical questions, the area now to be tackled is the radio model to reinvent and, particularly, the content to develop. However, now more than ever before, the debate around the technology is operating as a brake and freezing the possibilities of change. We have spent more than 10 years discussing the potentialities of digital radio, the added

values of the new supports, unfavourable market conditions, coverage, inexistent receivers and the announcements of unviable analogue switch-offs. These discussions have prevented us from beginning to discuss content, the question that both public and private broadcasters must take on without further delay.

The current radio programming model has run its course even before the digital debate has begun. However, in spite of this, and in the short term, it continues to be profitable to companies. It will not be so in the medium term. Broadcasters have to think about tomorrow's market, about the young audiences they are today having problems capturing, not to mention making loyal. As occurred with the appearance of FM radio, digital radio is the excuse or technological trigger for developing the new content that radio audiences are now demanding. Fundamentally, this new type of radio will have to develop new, specialised formats with a great level of synergy and interaction of content and services among the different digital supports.

Otherwise, we will be facing the situation that Bertolt Brecht presaged in his 1932 work on radio theory, in which we will have full availability of stations but nothing to say: "[radio] has the possibility of speaking to everyone, but looking at it closely [it is important it has] something to say". Or, what is worse, the things radio says may not interest listeners in the digital era.

Notes

1. The broadcast method for the DAB signal approved by the ETSI is characterised by using the multiplex broadcast system called COFDM (Coded Orthogonal Frequency Division Multiplex) and the signal-compression system called MUSICAM (Masking Patter Adapted Universal Sub-band Integrated Coding and Multiplexing) in the modulation process, which later assimilated the conditions of the MP2. In the COFDM system, the broadcast information is shared among a large number of interlinked carriers that use multiple routes between the transmitter and receiver to allow a better use of the frequency spectrum and to prevent the numerous interferences of multiple propagation. The MUSICAM compression system reduces the quantification of information by eliminating frequencies that are irrelevant or redundant to the human ear. These technical premises make it possible to establish synchronised, single-frequency networks at the national and regional levels and install networks of complementary transmitters in areas where reception from the principal transmitter is difficult or impossible due to shadow areas (Martínez-Costa 1997: 37-42).
2. The rise in the number of stations available was possible because the Radio Authority allowed the frequency blocks to redistribute the initial broadcast capacity of six channels to obtain 12 or 18 audio channels.
3. During the 12 months from January 2002-January 2003, the interest generated in the new services rose, as did the number of subscribers. XM figures grew from 17% to 32%, while in the case of Sirius figures were up from 8% to 18%, according to a report from Arbitron.

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EUROPEAN BROADCASTING UNION: www.ebu.ch

IBIQUITY DIGITAL: www.ibiquity.com

WORLD DAB: www.worldddab.org

Both Sides of the Digital Radio Question

Carmen Peñafiel

- *The implementation of digital radio is not being carried out in an equal fashion: on the one hand, and despite its promotion by international forums to find new ways to market it, it requires major investment to create a stock of digital receivers. On the other hand, digital radio will have to compete and coexist with analogue stations that are strongly established on the market.*

Despite the difficulties involved, DAB offers many advantages, including improved reception quality, the possibility of additional information, freeing up the radio spectrum and increasing the number of programmes offered, which could make it a new challenge for journalists and radio firms alike.

1. The Genesis of Digital Radio

The process of digitalisation in radio stations began in the mid-1980s. Production processes were the first element to be digitalised and, during the 1990s, broadcasts were transferred, thus completing the computerisation of radio stations. Efforts today focus on articulating traditional systems with the innovations and potentialities of the new techniques and technologies. The search is on for improved quality, increased transmission speed, additional efficacy and a rise in audience participation. This demand can be provided by DAB digital radio or an alternative digital system (DRM or RDS¹) or even radio over the Internet.

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Digital radio in Europe was established with the Eureka 147 project, which in the late 1980s developed a system called DAB (Digital Audio Broadcasting), based on a new and original modulation system that defined a high-quality multi-service digital radio able to be broadcast by land, satellite or cable. From then on, the digitalisation process has been the subject of problems, uncertainties and, it must be said, a great many expectations.

The Forum de la Radio Digital (DRF)² was established to develop the system in the European sphere and in particular, in Spain. It includes public and private broadcasters, network operators and transmitter and receiver manufacturers who try to promote the new digital model in an environment where few listeners know what it is, where broadcasters make little effort to create specific content and where equipment manufacturers won't take the first step because they fail to see the maturity of the market. In short, a fairly bleak picture in which big investments and shaky financial results are anticipated.

DAB is undergoing a very unequal development. It is a system implemented in Europe and a number of other countries, e.g., Canada, where it was necessary to create a new frequency band (in Spain, Band III). At the same time, other countries, e.g., the United States, opted for an alternative model based on sharing analogue (AM and FM) and digital systems, called IBOC (In Band On Channel) and marketed under the name HD Radio. European analysts have pointed out a number of problems with the American model, e.g., the interference created between the analogue and digital signals; the need to put up with a certain level of mutual interference, the need to control power relations. However, there are also a number of advantages, such as the fact that the system does not make it necessary to share a multiplex with other broadcasters and that listeners only have to adapt current

receivers rather than buy new ones, as occurs with the DAB model.

The DAB system is in its early stages in the vast majority of EU countries. An international organisation called the WorldDAB Forum was established to ensure its proper integration and development, bringing together more than 200 organisations including companies, institutions and national forums to generate promotional activities that would help consumers discover how radio broadcasts are transmitted and received and to check its evolution, obtain radioelectric resources and establish the conditions needed for its introduction.

DAB features a number of novelties and advantages over conventional analogue systems: it can relieve overcrowding on the saturated FM radio spectrum, it makes it possible to receive audio as well as data and images on the same

receiver, it permits improved sound quality, increases the range of programmes with digital quality and allows access to other services. The only standard imposed is that it must be flexible enough to handle any possibilities that may arise in the future³.

2. The Situation of Digital Radio in Europe

To date, the countries that have experimented most with digital reconversion are the United Kingdom, Germany and Spain. The other countries are in experimental phases and have a very unequal implementation.

The DAB system has been working in the UK since 1995 and currently covers 80% of the territory. The UK is the country with the greatest success in development and

10 Reasons why DAB Could Be of Interest

1. Improved reception, completely eliminating interference and atmospheric disturbances through the use of a COFDM system, which uses a particular code for distributing information among a high number of frequencies;
2. A sound quality equivalent to compact discs. DAB uses a sound-compression system called MUSICAM that reduces the amount of information broadcast.
3. As well as the digital audio signal, other types of information can be broadcast on an "information channel" that carries the multiplex configuration, service, date and time information, general information (traffic, emergency services, radio-station searches, global positioning systems, etc.). It can also broadcast data⁴ associated with radio programmes (track titles, author, lyrics, etc.) and transmit additional services, i.e., services addressed at a reduced group of users, e.g., the cancellation of stolen credit cards, sending images and texts to electronic announcement boards, etc. All this information is received on a screen incorporated into the receiver.
4. The DAB system makes it possible to multiplex different programmes and data services to form a block that can be broadcast together. The same service area is received by all listeners and then each listener can choose what they are interested in.
5. Coverage may be local, regional, national or international. The system can, in the same channel, add the signals coming from different transmitters, thus making it possible to establish single-frequency networks to cover a particular geographic area where it is possible to use small transmitters to cover shadow areas.
6. Efficient use of spectrum and strength. A single block can be used by a State, territorial or local network, with low-strength transmitters.
7. The DAB system works on the spectrum from 30-3,000 Mhz and specially adapted receivers are needed to listen to it.
8. Distribution can be by satellite and/or land or cable transmitters using different forms that the receiver detects automatically.
9. Each block or multiplex has a useable capacity of around 1.5 Mbits/second, making it possible to carry six stereo programmes and various additional services.
10. Services can be structured and configured dynamically. The system can accommodate transmission speeds of between 8 and 380 Kbits/second, including adequate protection.

social implementation. The BBC and the private operator Digital One have created a consortium for providing digital broadcasts sharing a multiplexor. The BBC has 12 stations and Digital One has eight commercial digital stations. There are also a large number of local and regional stations, which in total include 35 radio operators with more than 250 digital stations. It is expected that another five multiplexors will be approved in the near future, with which the number of stations will rise noticeably. However, the advantages of DAB are not exploited to their full extent, as most of the services offered are traffic reports and programme guides.

The UK has made a particular effort to promote marketing campaigns presenting the advantages of digital-radio reception and stimulating the sale of new digital receivers, as well as undertaking experimental tests and continuing to research the digital divide.

In Germany, the system began to be developed in the southern länder and there are now digital broadcasts in all 16 federal states. We could classify the implementation in Germany as acceptable: it is considered the second driving force of European countries in the implementation and development of DAB. By mid-2003, there were more than 150 digital stations covering 65% of the territory and the WorldDAB Forum considered Germany to be the key country in Europe in terms of developing the DAB system because of its potential market size. It would also be good for countries such as France and Italy, where implementation has ground to a halt, to take steps to ensure a strong potential market for the new model.

The implementation of digital radio is insignificant in the other European countries, although the more optimistic analysts think it could become a reality by the end of 2010.

In Spain, Royal Decree 1287/1999 of 23 July, establishing the National Digital Broadcasting Technical Plan⁵ was approved, setting out that DAB would be a public service subject to direct and indirect management and framing the phases for its introduction. The new model forced small broadcasters to group together to bring down costs and make the contracted frequencies profitable. 50% of the Spanish territory has been covered so far and regular broadcasts began in October 2000, although experiments were carried out in 1995, when RNE ran some tests in Santander, within the framework of the summer course of

the Menéndez & Pelayo International University. SER held an annual directors' meeting that was broadcast digitally from Pamplona in 1996; and in 1997 Catalunya Ràdio, COPE and Radio Galega also tried out digital broadcasts. But the truth is that almost nobody listened to them because there were no receivers available on the market at an accessible price⁶.

11 broadcasters have transmission licences and the first tests were carried out in Madrid, Barcelona, Valencia, Catalonia, the Basque Country and Galicia.

The 11 licences went to Radio Nacional de España, which does not take part in any tender and by law can have six programmes for its various content; Popular (COPE); Sauzal (Interconomía); Recoletos; Unedisa (El Mundo); Unión Radio Digital (SER); Uniprex (Onda Cero); Quiero TV; Sociedad de Radiodifusión Terrenal (Onda-Rambla Planeta); Prensa Española de Radio por Ondas (ABC) and Unión Ibérica Radio (Cadena Ibérica). In a second phase, digital radio will be regulated at the autonomous-community and local levels. The validity period for the licences is 10 years, renewable for periods of a similar length.

In Catalonia, the Catalonia Telecommunications Centre has a network of five transmitters in Alpicat (Lleida), Collserola (Barcelona), Montecaro (Tarragona), Musara (Tarragona) and Rocacorba (Girona), which operate on channel 11D. The five transmitters cover approximately 80% of the population. It was expected that by the end of 2003 Catalonia would have not only the 18 digital broadcasts it received under State coverage, but a further 12 regional and 15 local ones (six in Barcelona, four in Tarragona, three in Lleida and two in Girona). In Barcelona, for example, people will soon be able to choose from among 36 digital broadcasters.

Meanwhile, in San Sebastián, Barcelona, Valencia and Madrid, Retevisión has a network of five transmitters (Jaizkibel, Torrespaña, Navacerrada, Collserola and Picayo) operating on channel 11B. This network transmits the test programmes of RNE and other commercial stations.

The Basque government has a 300W transmitter in Zaldiarán, which has been running test broadcasts since November 1999 and which provides coverage to 230,000 people living around the city of Vitoria, as well as the conventional programming of Radio Euskadi, i.e., programme 2 of Eusko Irratia.

Coverage of Populations That Can Receive DAB Broadcasts (January 2003)

Germany	65%	Israel	85%
Australia	15%	Italy	30%
Austria	19%	Lithuania	20%
Belgium	98%	Norway	50%
Canada	35%	Poland	8%
China	2%	Portugal	75%
Croatia	30%	U.K.	80%
Denmark	75%	Czech Rep.	12%
Spain	50%	South Africa	18%
Estonia	28%	Singapore	100%
Finland	40%	Sweden	35%
France	25%	Switzerland	58%
Holland	40%	Taiwan	90%
Hungary	30%	Turkey	12%
India	1%		

Source: World DAB Forum⁸.

The law sets out that a single-frequency network of a national scope without breakouts and multi-frequency networks with national coverage will be established by 30 June 2006. At the same time, and without exceeding this date, single-frequency and multi-frequency networks in each autonomous community will also begin. In the final phase, the implementation of DAB in Spain will cover around 95% of the population. This phase could be expanded for a period of 20 years⁷.

There are a number of stations in Spain that have been running test DAB broadcasts since late 2000. The first were the stations involved with MF1. Because there are very few receivers in Spain, most of the digital broadcasts can be heard over the Internet, where the majority of the stations have set up websites and created their own portals. Examples include Mundo Radio, Radio 1 and RNE's Radio 5, Radio MARCA Digital and Radio Euskadi, part of the Basque public company EITB.

3. Hopes and Fears for the Digital Start-Up

Digital radio is clearly a technology that is creating new growth opportunities for a technically saturated medium. However, there are obviously difficulties in starting up the technology and there are a number of factors that explain why the digitalisation of radio is proceeding so slowly. On the one hand, broadcasters complain about government requirements to meet the development schedule of the established service, taking into account the almost complete lack of DAB receivers and the high cost involved with it.

Some experts feel that digital radio was born with little strength in the field of regulation. Many mistakes have been made, e.g., thinking that digital radio was a complement of analogue radio. It would have been much better to have had a firm plan with regard to total reconversion or analogue switch-off, as happened with television (which will by law have to broadcast in digital after 1 January 2012).

Digital radio will coexist in its development and evolution with traditional analogue radio, something which will obviously lead to competition - to date the market is controlled by conventional radio, which has a stock of cheaper receivers and much more consolidated content through radio supplies. Digital radio, on the other hand, still has neither complete nor quality programming.

Furthermore, digital radio is a great unknown, because, as it does not maintain the territorial breakouts used to date, it may lose value for local interests and identities and possibly also lose its freshness. Nobody knows very well how audiences will react, although the feeling is they won't be very pleased.

There are few receivers on the market and equipment manufacturers refuse to produce more until there is more demand. The vicious circle that has been created can only be broken when one of the parties involved assumes the risk of launching a product or service without compensation from the other parties involved in the process. To that effect, the private operators that broadcast digital radio in the United Kingdom have said that joint work between manufacturers, broadcasters and distributors is essential to the success of DAB. That is why, when warnings began to be sounded about manufacturer apathy, they began to make chips to bring down the price of receivers. This meant they were able to fix the price at €450 and release 300 receivers for sale in

London while a marketing campaign promoting DAB was being carried out. The receivers sold out immediately. A further 135,000 receivers have since been sold in the UK, 80% of the country has been covered and a total of 35 public and private stations broadcast programmes on 280 channels.

It is also important to see how value-added services are transmitted, as reception requires the availability of data receivers (whether integrated in the audio receiver or not) offered in the set and at an accessible price.

There are two sides to the question of the digitalisation of radio. On the one hand, it has many technical advantages, but on the other nobody is using it because there are no digital receivers, even though there is coverage for 20 million listeners. This thus means it offers few services and has a very small client base, making it hard to make digital reconversion a reality and to get audiences to adopt the new model. It is necessary that listeners find a differentiated quality supply so that users will want to opt for digital content and applications. There was an attempt to implement the digital model too quickly, but it needs time and for the right conditions to prevail. At the end of the day, the difficulties are more commercial than technological.

The DAB model can be broadcast through other technologies, including third-generation mobile phones or the Internet or by using digital television platforms by satellite, cable or land, etc. In Europe, projects for satellite digital radio are being developed, although the main way in which digital radio is supported in Spain is through terrestrial digital radio. The supports are there, now we just need to provide the new radio with content and applications and create a market with a strong demand for receivers.

4. Creative Possibilities

To develop DAB it is necessary for it to become more popular and to carve out a place as a full-service medium. It thus has to focus on content. Radio, like the other media, is beginning to be a multimedia project where diverse types of technology and different types of equipment are integrated in a single piece, and where new languages and services converge. Digital radio must make an effort to offer a new communication model, as well a restructuring of languages and formats.

DAB enables and demands increased programme specialisation, as target audiences are made up of numerous diversified and segmented sectors according to the specialisation of the broadcast content. With this new situation, audiences come out the winners in so far as they can choose the shows that most interest them from among the ones on offer.

The programming we listen to today will be differentiated under digital programming, not just in terms of quality but also with regard to content. It will be necessary to redesign a specialised programming based on new formats. The early experiments with digital radio in Spain basically just offered news, music and sports.

The initial programming of El Mundo Radio is based on continuous music with occasional broadcaster ID breaks, but the final aim is offer news, interviews, specialised programmes, issue-based shows, leisure programmes, etc. It includes useful guides to business services, hotels, restaurants, distance-education courses, facilitates the transmission of maps, graphics and photos and offers up-to-the-minute stock-market and weather information.

The programming schedule of MARCA Radio Digital focuses on sports events, competitions, interviews, opinion programmes, etc. Its promoters define it as a new leisure and entertainment station addressed at sports fans. It broadcasts 24 hours a day and aims to be an alternative to conventional sports programming.

All up, the vast majority of the stations that do digital broadcasts use content from analogue radio, such as in the case of Radio Euskadi, which basically offers music programming, the odd sports show and the talk/interview programme, *Boulevard*.

5. A Future Perspective

The media are very sensitive to changes and progress in the audiovisual sector. Radio is no exception and broadcasters immersed in the digital revolution do not want to miss their chance to occupy a space on the spectrum of opportunities the new technology offers. Research and experimental tests are being done in order to be ready.

Radio journalists have to face new challenges: digital radio has an added value (e.g., written messages, oral messages

and fixed images) and they should therefore have specialist know-how. The new radio system can offer supplementary information on a number of very different topics and for diverse audiences. This is very useful and plural information that can be received at home, in the car, at work, etc.

Work methods in news production, scriptwriting, editing, etc. have changed. Everything seems easier with the computer and the software specific to each area. The leap from the typewriter to the computer; from the tape recorder to DAT; from wire services that used a bell for urgent information to ones that offer various sources with computers in any workstation, at any time and from anywhere; access to agencies and databases without having to leave the newsroom; access to huge amounts of information in a short time; the possibility of easily changing and rewriting different versions thanks to the computer, etc. are giving way to newsrooms with different correspondents' reports that can be called up from a computer; the selection and treatment of music from the Internet; image banks and sound libraries to hand thanks to the computerisation of all departments even within a station, etc. Even internally, integrated service digital networks (ISDN) have made life easier for journalists, letting them send quotes or news reports between different broadcasters without having to use the conventional phone line, and which furthermore offer a better sound quality. Then there is the big revolution offered by mobile telephony technology as a multimedia terminal: in the old days it was necessary to send various mobile teams with a radio-frequency system to cover an event; now, however, one person can send the story directly to the newsroom from their mobile. Furthermore, mobile phones are examples of all the progress that was unimaginable a few years ago, as they have become a personal computer with Internet access, a receiver of data, sound and image, a radio, a digital camera, a transmission support, etc.

Radio journalists have had to refresh their skills over the past decade to get a handle on the progress made, because any professional must have a good knowledge of his or her medium and the tools involved in order to work in it. Older journalists went from editing that involved cutting and sticking tape to directly preparing all the news items from a computer, with a better quality sound and in a much shorter time. Computers make it possible to create a cleaner sound,

free from noise and interference. But younger journalists have had to learn to make radio programmes with new technologies, something that has not involved any great change for them. Even though we should not forget that technology is learnt with a greatly or lesser degree of difficulty, the journalists of any medium must, as a priority, know how to provide radio with content, how to write a column, a report, a feature article, how to make a programme, how to put their creativity to work when creating radio formats, etc.

Technology and the diversification of the media have changed the traditional figure of the journalist. Attitudes and abilities such as flexibility and multi-tasking are concessions to a technological revolution that stems from the use of multimedia systems and languages that have to be learnt. The new crop of young journalists has to meet a huge series of CV requirements: it is not enough for them to hold a degree in journalism or audiovisual communication, they must also have languages, computer skills, infographic and design skills, they must know how to work hard disk-driven digital systems, the Internet, simultaneous conversion of a text into sound or images, online relations, source recognition, etc. The trend is moving towards the overall figure of the journalist with multifaceted training.

On the other hand, the figure of the teleworker and collaborator is also on the rise. These people have the technological equipment (i.e., a modem and portable computer) that enables them to report nearly any event and to travel around the world in a matter of seconds. That does not mean that tele-work is a widespread solution: many people believe it is a lonely and boring way to work, but it is a practice that is taking off in the US and beginning to have supporters in Europe. Many news companies offer this new work formula because it provides them with a strong network of outside collaborators and they only have equip the existing newsroom with the technology needed to transmit or broadcast news over the Internet from any place. Working from home radically changes a company's structure and organisation, as well as the mentality and habits of its employees (never-ending timetables, requirements of the new media, etc.). It is fairly likely that new technologies are making us hyper-communited. They are certainly making us socially isolated. Journalists have to be aware that the Internet and new technologies

mean access to more information, and cannot forget about the rigour the job demands in choosing the issues that will be of most interest to the audience.

We are in a new era in which digitalisation rules and which features the convergence of supports and media alike. Most of the new media companies being established or modified tend towards the integration of studios and newsrooms. Companies are not just radio, television, print or film organisations but are major multimedia groups that include different media in order to share news and technology resources. These multimedia conglomerations in many cases are formed by economic interests outside the world of journalism. EITB recently opened some very modern facilities in Vitoria-Gasteiz where the radio station looks like a television station and vice versa. The big media groups and many radio stations are squaring up to the future with major investments in an integrated and interconnected model of all their radio and television channels, which involves the complete replacement of production and broadcast systems. Technological investment is the main goal of the big radio and TV channels, as they all attempt to restructure and adapt to the new processes of digitalisation.

This technological reality opens the door to a professional convergence between the different sectors of journalism. This has been called “multimedia journalism” and is transforming the job of the reporter, who has become a content provider for the company where he or she works.

A radio experts’ meeting⁹ set out the following emerging professional profiles:

- **Format creator:** the job is to think up content and new programme ideas for a changing radio, with added values, a radio in multiple supports that will fragment the audience.
- **Multimedia reporter:** a multi-tasking journalist able to prepare content in the form of texts, images and sound in different supports.
- **Scriptwriter:** a figure that had nearly disappeared and which is returning to the world of radio with force. A creator charged with shaping programmes and preparing a multimedia script.
- **Computer Expert:** a highly qualified professional who monitors inhouse production and communication processes. He or she plans and executes analysis programmes and computer systems.
- **Multisupport Programme Editor:** charged with deve-

loping content and releasing it as an end product. Controls all the production process, new technologies and different languages and is responsible for how the programme is prepared on different supports.

- **Multimedia Documentalist:** Charged with the treatment, classification and cataloguing of texts, images and sound. Works on the integration of sound libraries, video libraries and written documentation (until now independent). In this field it is necessary to agree on a standard format for digitalising archival material.
- **Producer-Operator:** responsible for planning and the creative stage of the programmes.
- **Commissioning Programme Producer:** responsible for preparing products commissioned by broadcasters.
- **Animation and Multimedia Technical Expert:** specialised in the new information technologies applied to graphic design and multimedia creation. Demand for new supports such as websites, DVD, graphics, PDA and NPAD require technical ability.
- **Market Research and Audience Technician:** the job involves developing market surveys on new products and services and analysing programme impacts on audiences.

6. Conclusion

As we have seen, digital radio has many possibilities for combining different technologies and digital networks, but adaptation to the digital standard is occurring slowly and problematically because of the elements that converge in the definitive start-up of the new system of numerical coding (few digital receivers, a scarcity of specific content and a great deal of questionable content, broadcasters not willing to take risks or who do not see medium-term benefits, a certain apathy on the part of equipment manufacturers, etc.).

The digital standard most European countries have adopted is based on Eureka 147 DAB, although there are currently very few countries that have reached a coverage of over 50%. Only the United Kingdom, Germany and Spain are driving forces in the digital system. This inequality among European countries is principally due to economic, technological and political factors. Uncertainty and caution are the adjectives that could classify the process of digital reconversion.

In Europe, the public sector has made the most inroads towards digitalisation, while the private sector is dragging its feet, given the major investments needed in technological restructuring.

Programming addressed at digital radio must be specialised and redesigned and has to be based on new formats, as most countries simply simulcast the same analogue programming and have few specific programmes (generally music shows and information). Broadcasters must also work on one of the newest aspects of the new digital formula, i.e., value-added services that are suffering a certain stagnation and whose possibilities are not being fully used.

In Spain, where 12 DAB licences have been awarded, analogue programming is used on digital channels. The stations that have licences have failed to move forward from a period of experimentation and the other radio stations, both large and small, are waiting to see what will happen in the sector with the announcement about digital radio.

With regard to radio *on* and *over* the Internet, for now Spanish radio companies mainly use the Internet as a complement to their analogue transmissions, as a value-added service to their listeners or as a way of contacting with the audience and thus obtaining information or facilitating participation, but not properly assessing its properties as a valid medium for broadcasting journalistic content. However, the Internet has recently garnered higher prestige, particularly following the terrorist attacks in Madrid (11 March 2004) and the general elections soon after (14 March 2004).

On the other hand, the journalist as a content creator will also have to adapt to the times and develop a good working knowledge of the tools needed to broadcast written, oral and fixed-image messages. The new technology offers a wide range of opportunities that any good broadcaster must know how to use.

Notes

1. DRM stands for Digital Radio Mondiale, a group established in the late 1990s with the idea of providing traditional medium-wave radio with a better sound quality by digitalising the waves modulated in amplitude. RDS (Radio Data System) sends data over the FM band to radio receivers installed in cars to provide complementary station information on the highway situation, traffic, weather, stock-market information, etc. Now, with digital technology, RDS facilitates a high-quality sound reception, making reception problems such as radio broadcasts that drop out in poor weather conditions, etc, a thing of the past. In Spain, a number of radio stations use RDS, including RNE, SER, COPE, Onda Cero and some stations in the autonomous communities.
2. The Forum de la Radio Digital organises different promotional activities, presentations and conferences to promote digital radio in trade fairs and congresses and in activities where radio stations are present.
3. Further information and different approaches towards digital radio can be found in the work by PEÑAFIEL, Carmen and LÓPEZ, Nereida, *Claves para la Era Digital. Evolución hacia nuevos medios, nuevos lenguajes y nuevos servicios*. Bilbao: UPV/EHU, 2002. pp. 125-159.
4. Value-added services are called PAD (Programme Associated Data, i.e., information about the broadcaster and programme, etc.) and N-PAD (data unrelated to either the broadcaster or programme, but which involve different types of information such as programme guides, weather forecasts, emergency services information, etc.), which can be transmitted via an independent channel.
5. The Technical Plan established the existence of three multiplexes with a national coverage: two in multi-frequencies (MF-I and MF-II) with breakouts for the regions, and one a single frequency (FU-E) without breakouts. Each included six programmes. There is a single-frequency multiplex in each autonomous community, without provincial breakouts, and one multi-frequency with a breakout capacity, as well as the local multiplexes that each community decides on. The Government has the mandate for State-wide multiplexes and the autonomous communities have it for local and regional ones.
6. ORTIZ, Miguel A. and CUESTA, Juan (ed.). *La radio digital, nuevos perfiles profesionales*. Department of Work at the Government of the Community of Madrid and RTVE, 2003. p. 23.
7. Official State Gazette, No. 177, of 26 July 1999.
8. ORTIZ, Miguel A. and CUESTA, Juan (ed.), 2003: 20.
9. ORTIZ, Miguel A. Y CUESTA, Juan (ed.). *La radio digital, nuevos perfiles profesionales*. Department of Work at the Government of the Community of Madrid and RTVE, 2003. Pp. 37-41. The author of this article took part in the meetings in the capacity of an expert.

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The Sector Analyses Digital Radio

Fernando Rodríguez Madero

Introduction

Discussions about digital radio seem to include a unanimous basis on the potential of the digital revolution in the sector. However, there are also many question marks about formats and implementation schedules.

For example, if there have been digital broadcasts with practically complete coverage across Catalonia for the past seven years, why have only a few hundred receivers been sold? Are they not economically accessible because there aren't enough listeners or vice versa? Will interactivity be the killer application to woo consumers and promote digital radio consumption? Why have Spanish forums been in a catatonic state for more than the past two years?

To answer these and other questions, and as digital radio is the issue tackled in this edition of *Quaderns del CAC*, the Catalonia Broadcasting Council asked people who work in the sector and members of the Forum de la Radio Digital about the state of play with regards DAB. I would like to acknowledge the participation and comments of Jordi Rueda i Giné, director of Catalunya Ràdio SRG SA; Eugeni Sallent Garriga, president of the Catalan Radio Association and managing director of Radiocat (RAC1 and RAC105); Isaac Moreno Peral, technical director of Radio Popular and a telecommunications engineer by trade, and AETIC (the Association of Electronic, IT and Telecommunications Companies of Spain), the association that arose from the merger of ANIEL and SEDISI.

The Forum de la Radio Digital was established in January 1998 with the aim of promoting the development of the

medium in Spain and is composed of public and private broadcasters, network operators and transmitter and receiver manufacturers. The government also participates, although it is not an active member.

With regard to the Catalan sphere, the DAB Forum in Catalonia was established at the initiative of the Generalitat on 14 October 2003, with representatives from private and public organisations. The government representatives included the Office of the Communication Secretary, the Office of the Telecommunications and Information Society Secretary, CIDEM and the Catalonia Broadcasting Council. The members of the Forum discussed matters including the schedule for getting receivers onto the market, content development and differentiated services and the promotional and communication plan for the new technology.

What is the Situation surrounding DAB?

The general opinion of people who work in the radio sector is that the infrastructures for developing DAB technology are in place but the conditions are still not right to start it up. The sector is aware of the need for all the parties involved to work together on promoting its introduction. These parties include the Administration, manufacturers, distributors, broadcasters and signal providers.

The first digital broadcasts began at the end of the 1990s. However, equipment manufacturers have been investing in developing receivers since 1995. Ultimately, the sector did not realise the market release it was aiming for because the implementation process for DAB technology slowed down and is still waiting for the push it needs to gain a foothold on the market.

Everybody agrees that the main advantages of digital radio are increased sound quality, interference-free reception and

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the existence of value-added services. Another of the main reasons for moving to the digital system is the saturation of the FM spectrum and an interest in obtaining new audiences.

Below are the considerations of the sector experts who took part in preparing this article. They include the views of public and private broadcasters and manufacturers and look at the prospects and possibilities of digital radio as a new technology for media consumption.

The Future of DAB

Jordi Rueda i Giné, director of Catalunya Ràdio SRG SA, says the development of any technology requires time and that it is particularly important for the right conditions to prevail. Although today we are used to using CDs as a form of recording, we should remember that it took a few years from when the technology reached the market through to when its use became standard. A similar example, which is easier for us to remember because it was not so long ago, is the time it took for reasonably priced DVD players to come on to the market along with a good range of DVD videos. In both the above examples, the turning point for the new technology was when the ideal conditions were in place, i.e., there was enough information among consumers, players had dropped to a good price, previous works were published in the new format, new titles exclusive to the new technology were released and major promotions were done about the new formats.

Digital radio is no exception, Rueda says. It is true that DAB technology has been available for many years. Catalunya Ràdio has been running DAB broadcasts since 1997 and there are receivers available to the public, even though they have been aimed at a minority consumer. However, it is clear that the right circumstances have yet to be reached to constitute a turning point.

When it comes to explaining the stagnation in DAB development, people often mention the classic vicious circle: few consumers, which leads to expensive receivers, which leads to few DAB programmes, which leads to few consumers. There is no doubt this mechanism exists. However, we need to look more closely into the matter if we want to discover the factors that can help promote or stop this stagnation from continuing.

The appearance of DAB obviously represents a substantial transformation of the radio sector. Because of its technological peculiarities, the European project on digital radio makes it necessary to extend the spectrum in a new frequency band. This is an essential feature of the European system and it should be no surprise that it contains the key to the future. The criteria applied when it comes to managing the assignation of new digital stations among the existing broadcasters and the new ones, i.e., the new radio model, will determine whether the European project succeeds or fails.

Broadly speaking, the current DAB spectrum makes it possible to include a similar number of broadcasters as there are on FM. This means doubling the current capacity. Independently of whether new broadcasters join and the proportion to which they may do so, a 100% rise in broadcast capacity represents a very profound transformation of the sector, which could even lead to an unsustainable situation.

Jordi Rueda is of the opinion that the new radio model should avoid such an abrupt transformation and take into account and conciliate the different expectations and interests of the current broadcasters and those who seek to enter the radio sector for the first time. It should also satisfactorily meet the needs of local stations.

The current broadcasters see DAB as an excellent opportunity to improve their geographical coverage. They are also aware that it is very likely to be the future format and are therefore keen to be involved. On the other hand, they also know that the funding ability of the private radio sector is limited and will be unable to meet the rise in production and transmission costs that the incorporation of new stations with differentiated programming will involve. For their part, the new broadcasters believe DAB is the chance they were waiting for to enter a sector with a completely saturated market.

Finding a way for all these interests to be met is vital to DAB's development, as it mostly depends on broadcaster attitude, given there are no other factors that could lead to this progress beginning by itself. It would be very different, for example, if DAB offered a sound quality vastly superior to FM (as FM did in the 1970s over MW) or if its potential for transmitting data and images was well known to the public and had generated expectations among consumers. If either

of these encouraging circumstances had occurred, it would have been enough to ensure the development of DAB without further ado.

Rueda says that the very existence of a clear, consistent and future-looking radio model could create the conditions for DAB to be correctly developed. Firstly, if we want to consider DAB as the radio of the future, it will be necessary to anticipate and ensure the long-term presence of the current broadcasters on the new digital dial with at least the same number of stations as currently available. Initially they could simulcast their analogue programming until such time as DAB was fully implemented, at which point they would exit the FM band. Secondly, the new broadcasters should join the new dial, progressively if appropriate, in line with the integration of the radio sector, without endangering its stability. Finally, local broadcasters could initially stay on the FM dial, which would be gradually freed up as State and autonomous-community broadcasters migrated to DAB. FM is currently better suited to local broadcasters than the more expensive and complex DAB, which requires, for example, signals to be transported from different local stations to a joint multiplexer. In a more distant future, when technology allows, local stations could also migrate to DAB on the L-band and definitively abandon FM. It is hoped that, when this point comes, analogue radio will be a completely obsolete technology compared to DAB, which supposedly will have been promoted and have exploited the advantages and potential of digital systems. There could be a situation similar to that of vinyl compared to CDs, or DVDs with respect to VHS. By their natural evolution, new technologies can end up replacing previous ones without their disappearance having to be planned.

A question on many people's minds is what interest would there be in offering DAB if the current broadcasters simulcast. The answer lies with the new stations and particularly the public ones, which will play a key role in the consolidation of what could be the radio system of the next few decades. Activity must be aimed at promoting the advantages of the new format, offering new content and services and ensuring a sufficiently extensive geographical coverage for the new DAB broadcasts. However, working together is not enough. As has been shown in the United Kingdom, the country that has made the most progress in digital radio in Europe, the firm and active support of the

administrations and policymakers involved is essential to an effective strengthening of DAB as the digital radio system of the future.

With regard to the American IBOC system, some people believe it has advantages over DAB. The IBOC system, which has been christened HD Radio and covers the transformation of FM and AM to the new digital environment, does indeed have a number of strong points. The first is that it does not change the radio landscape the way the European system does. It simply improves quality and offers new features to current broadcasters on the same point on the dial. A second advantage is that the migration can be done at the rate that each station considers appropriate without being conditioned by joint actions. A third advantage is the possibility that a broadcaster can transmit simultaneously on the same station in analogue and digital formats. It is obvious that a lot of care was taken in designing the American system to facilitate the analogue-to-digital migration. Looking at these advantages, it is easy to ask whether this system could be applied to Europe. The answer lies in the technological content. The IBOC system would not work well on a spectrum as dense as Europe's. Furthermore, as has been mentioned before, it is precisely the need to free up the FM dial that led Europe to seek a solution that includes broadening the spectrum.

The worrying situation of FM spectrum saturation and the needs of an increasingly diversified society require the incorporation of new technologies to resolve current limitations. This solution in Europe is DAB, and its correct development requires the visualisation of a clear and coherent radio model for the future that inspires confidence amongst broadcasters, equipment manufacturers and consumers. Public broadcasters are called on to play a key role in this process of the promotion and standardisation of the new digital format and the administrations and organisations involved in DAB should offer their help and support. These reflections, although the result of an analysis of our local environment, must be established at the European level, even though the responses may not be the same for everybody. The price of major-brand receivers, a definitive and indicative factor in the level of implementation of the digital format, can only come down significantly when there is progress at the European level. That is when we will be able to talk about the success of DAB, Rueda says.

The Digital Transition: A Long Way to Go

Isaac Moreno Peral, technical director of Radio Popular and a telecommunications engineer by trade, says there is no doubt that the future of radio, in technological terms, is digital. For more than three years 18 State programmes have been running, covering over half the Spanish population. Autonomous communities such as Catalonia have been broadcasting DAB programmes for years and have been awarded digital licences. Despite this, the real question is the speed with which the establishment of a significant number of receivers is being carried out, an indispensable element in the provision of the digital radio service. The number of digital receivers today is practically non-existent in Spain, where the price of receivers is a major obstacle to introducing DAB that partly explains the lack of repercussion on the State market. This is just the tip of the iceberg, because the causes, some of which are detailed below, are varied and profound:

a) The development of digital radio in the European Union is not coordinated or homogenous. There are no common frequency bands nor procedures to award standardised licences in Europe. It is important to remember that the spectacular success Europe has enjoyed in the field of mobile telephony is mainly due to the establishment of a European directive that freed up the frequency band for the exclusive and compulsory use of digital mobile telephony, a common regulation to implement it (GSM) and a resolution on the coordinated introduction of the service, which was born with a pan-European vocation. Without a coordinated development it would not be easy to achieve a market volume of receivers able to break with the analogue hegemony.

b) The model chosen to introduce digital radio fosters slow transitions. Unlike digital television, DAB was born with an additional modality over analogue methods based on different frequency bands, without establishing a defined and specific schedule for the disappearance of analogue stations. Digital radio will thus have to fight an unequal battle in which analogue will have the best weapons, such as better-priced receivers, more stock, evolution and different content. We should not forget that MW and FM coexisted side by side for decades.

c) Today's radio is mainly based on the existence of State (or national) stations with local breakouts. Even though a

significant part of the licences awarded enables a programme to make territorial breakouts, the sphere of the territory allowed for these breakouts (covering areas that stretch beyond an autonomous community) means there is no interest in exploiting them commercially in line with current market patterns.

d) Analogue broadcasting, which has to share a mature advertising market with the new digital operators, is forced to double its distribution costs for digital signals with ambitious and demanding coverage terms. Under these conditions, it is really hard to support the production of new programmes for the exclusive use of digital radio (with new added costs) that could stimulate the purchase of receivers. This leads to a vicious circle that makes the development of this new type of radio necessarily slow.

Despite all the above, Moreno says there are reasons for hope. The quality of digital radio and the possibilities offered by broadcasting additional data, which could eventually lead to the possibility of developing new funding methods other than advertising, are two strong arguments in its favour.

Furthermore, with the Act that accompanied the state budgets for 2004 the Spanish government opened the door to a new way that will allow MW and FM to be digitalised under certain conditions. Even if these technologies have still to prove themselves and stabilise, their philosophy (based on the use of the same analogue frequencies as authorised for broadcasters and which, in particular conditions, makes it possible to transmit simultaneously using the same structure) would enable a calm digital transition for the current analogue broadcasters.

In short, we know that the move towards digital radio has begun, the transition will be lengthy, no technology can be clearly seen to be better than the rest and that at the moment the ground has been laid for Spain to have an effective competition between digital radio technologies. Clearly, the State market is not big enough to make a decisive decision about this competition. The future of radio is still to be decided and will depend on the steps that the countries involved take.

Advantages of DAB

Moreno emphasises that the main advantage of digital radio is reception quality, even when the receiver is moving. This quality is comparable to that of compact discs. In short, the introduction of digital radio will make it possible to recover the quality ground lost with respect to the other audio media that have been on the market for some time. This quality will be maintained even within cities and when driving, something that does not happen with analogue radio.

As well as quality, digital radio offers other advantages:

- a) The possibility of dynamically transmitting other data signals, whether coded or not, and making the most of the agile transmission rates of information. These added services include the transmission of a fixed image along with the spoken story; the transmission of detailed and high-resolution weather maps; traffic-information systems with recommendations on alternative routes; pay and transmission systems for data in closed groups of users, e.g., information on credit cards, the weather, distance education, etc.
- b) Greater spectrum efficiency, which could lead to more, and more varied, programmes.
- c) Possibility of organising broad territorial coverage through the use of a single frequency.

The Regulatory Environment of Digital Radio

The basic regulatory framework that makes the introduction of digital radio possible has been in place since late 1997. This framework establishes that the introduction of digital radio will be based on terrestrial infrastructures, according to the Technical Plan approved by the Government, and allows State, autonomous community and local areas to directly or indirectly manage them via government-awarded licences.

The Technical Plan and the Service Provision Regulations that have been prepared include awarding licences according to the DAB standard developed in Europe within the Eureka 147 programme. Moreno says the publication of these guidelines has revealed the government's attempt to prevent the replacement of technologies.

The DAB Situation in Catalonia

Eugeni Sallent Garriga, president of the Catalan Radio Association and managing director of Radiocat (RAC1 and RAC105), says that the starting point in Catalonia will come soon, when there will be 42-48 digital radio stations on offer, according to the area you tune in from. Some of these new programmes (i.e., those involving Catalan digital pilot tests and State grants) have already been on the air for the past four years. Others include the recent winners of licences awarded by the Generalitat and which are on the point of beginning their broadcasts.

There is thus a situation, from the point of view of listeners' choice, that has never been available in Catalonia before: new offers, many with value-added services, thanks to the potential of data channels.

Despite the advantages of the new technology, DAB has still not taken off in the rest of Spain. 12 commercial digital-radio licences plus six public ones have been up and running since the year 2000, but DAB has no public presence. This is not the case in the United Kingdom, where 500,000 digital receivers had been sold by February this year and the one-millionth is expected to be bought before the end of the Christmas campaign.

Sallent says this is a good time to question why digital radio is doing well in the UK but not here, and to question the differences between the English model of digital development and the model (if there is one) that has been promoted in Spain.

Firstly, it should be said that everyone agrees that the future of radio is digital (or it won't have any future) and that in the face of the promotion of new audio broadcast technologies, the DAB standard meets enough conditions to guarantee this transition from the radio sector alone. However, everybody also immediately goes on to involve other parties, i.e., Administrations, equipment manufacturers, wholesale distributors, broadcasters and signal providers. And the listener has begun to respond to this effort.

The preliminary requirements for success are technical coverage, availability of differentiated programming combined with the most successful analogue programmes, and availability at a good price of a range and variety of receivers. All of these factors must be produced now.

The Case of the United Kingdom

Sallent reviewed the contribution that each of the above players made to the development of the British market:

- **The Administration:** applied real policies of promotion, beginning with the regulatory process, and favoured access to existing analogue broadcasters (even prolonging the period of analogue licences to help support investment in digital deployment), provided access to new radio operators and involved the public sector, which devoted specific resources to the production of up to five new radio stations broadcasting exclusively on DAB.

- **The Network Operator** (the block licence winner): today guarantees coverage of 85% of the territory and has a proactive attitude that supports popularising DAB. The operator acts as the financial muscle in the process, investing in R,D&I together with receiver manufacturers for cheaper chips and promoting initiatives with real implementation effects.

- **Broadcasters:** all the radio stations participate as a way of supporting growth and guaranteeing the future. They offer new content along with the most successful analogue programmes but with improved sound and associated information. The BBC has had a major role in producing content of a higher cost and greater acceptance, offered exclusively by the digital stations, and private stations have broken new ground in news/talk and music programming.

- **Local Manufacturers:** the engineering and small-parts companies have ended up leading the production of receivers in this first phase because they saw a business opportunity in it and, together with the sector, developed mass-production strategies. They reached agreements that made them project partners, making it possible to bring down the price of receivers. For their part, the multinationals have taken up different positions on the issue and it is expected that after 2004 Sony and Sharp will join the other big firms, such as Phillips, Kenwood, Pioneer, Hitachi, Samsung and Grundig, already on the market.

- **Wholesale Distributors:** DAB is in department store lines and even in convenience stores. An accessible price was the indispensable condition for entering mass distribution channels and in terms of line profitability DAB now offers a fairly good rotation for wholesalers.

Once the licence bases had been set and consensus reached on the participation of each group, this climate of agreement gave rise to the creation of an instrument that has been extraordinarily effective in promoting DAB: the Digital Radio Development Bureau (DRDB). Promoted by the BBC and Digital One (the licence carrier of one of the blocks and the driving force in the private sphere in terms of financing), it has been in charge of promoting digital radio since 2001. It aims to popularise DAB through communication, promotional and advertising campaigns and by supporting wholesalers who promote DAB at the points of sale.

The DRDB has been the meeting point where the interests of all the parties involved have converged. Very demand-focused from the point of view of listeners and with the complicity of all the parties (each contributing their own know-how), it has been able to generate initiatives that popularised DAB across the UK.

Sallent says that the UK has broken the circle of inactivity, i.e., not enough accessible receivers means no DAB listeners; no DAB listeners means radio companies cannot support the production of differentiated content; no content means lack of listener interest; lack of listener interest means nobody prepared to pay a high price for a receiver. Manufacturers need a big demand for equipment to bring down the unit price of production. This is the description of what is happening with digital radio in Spain and there does not seem to be a solution in the near future.

Strategies to Develop DAB in Catalonia

Eugeni Sallent is of the opinion that the only possible strategy is to get all the parties involved to work in the same direction.

In Catalonia, there is now the opportunity of providing the definitive push for digital radio:

- The whole radio sector is interested: nearly all the analogue radio-licence holders also have digital programmes and the CCRTV has shown a particular sensitivity toward the development of DAB from the beginning. In fact, both the public and private sectors in Catalonia have taken part in the digital pilot tests for years.

- Catalonia has traditionally led innovation in radio content.

- It has the support of the network operator.
- The consumer electronics industry and SEAT are headquartered in Catalonia.
- There is a well-structured wholesale distribution network.
- Finally, and no less importantly, the Government has shown it is happy to promote the digital transition.

Of course we are talking about increasingly less local markets, but we should not forget that Catalonia has a potential audience of nearly four million people aged over 14 (1st trimester of the 2004 Catalan Radio General Media Survey) and is one of the areas in Spain with the greatest radio penetration. With regard to the potential receiver market, Catalans have a long history of snapping up new technology products.

We can therefore say there is now a unique opportunity to develop DAB because the factors that promoted it in the UK are converging here, by and large. The newly formed Catalan DAB Forum could be the platform to promote digital radio. It has a meeting point and has assessed a successful model. Now it has to move from the drawing board to management, Sallent concludes.

DAB As Seen by Manufacturers

AETIC (the Association of Electronic, IT and Telecommunications Companies of Spain) has reviewed the role of electronic-components manufacturers in the process of developing digital radio.

In 1995, industry presented the first specifications for digital radio equipment, i.e., transmitters and receivers, in the European sphere. Spanish industry participated very actively in this process, as it was seen as a good bet for the future.

The first equipment was manufactured three years later, in 1998. This effort was carried out in the expectation of meeting the demand the new service would raise. In July 1999, the government published the National Digital Broadcasting Technical Plan and the specifications for the public tender of 10 digital radio licences on a single frequency. In November 2000, the government awarded the licences, distributed on two State networks (MF-I and MF-II) with the ability for local breakouts, and two further licences

without the possibility of breakouts.

From that point on, the traditional broadcasters (with a long history of analogue transmissions) began to take up a very different position to that of the new media entering the market.

By late 2000, industry began to see that if the promotion of DAB broadcasts did not begin to focus on the innovative features that set it apart from analogue (basically, better sound quality and the possibility of receiving audiovisual content and applications) the chance could be lost, as indeed it went on to be. The terms have not changed since then and there has been no significant progress in developing the service.

Today, paradoxically, there are DAB broadcasts that reach over 80% of the Spanish population, but the public still does not know how to receive these high quality, value-added transmissions.

AETIC found the following factors were to blame for the current situation, which could be described as a 'stoppage' of the service: the lack of a promotional campaign that would have been basically launched by the licence-holding broadcasters, a lack of interest on the part of the public and not enough concrete information on the analogue switch-off, which would allow the coexistence of digital and analogue transmissions.

In terms of receivers, there is no manufactured stock at present - not because digital receivers have not been sold, but because most of the ones in the warehouses have suffered from flaws in recent years.

Industry, which made a big effort in getting the service under way with the design and manufacturing of equipment, has been unable to write off its investments because it has been unable to find a market for the receivers, and there are still no schedules in place for reinitiating this activity unless there are clear signs of the service being relaunched. As soon as the favourable conditions are in place, industry is ready to service the demand and put a large number of receivers on the market quickly.

Initiatives of the World DAB Forum

Now that I have given you the opinions of sector representatives, I would like to mention some of the conclusions

and most interesting information that arose from the congress entitled "DAB Christmas 2004 - Marketing DAB Digital Radio", which the WorldDAB Forum organised on 10 May in Berlin. The two aims of the congress were to publicise the situation of DAB on the different markets and to provide incentives for distributors to get involved with the DAB products that already exist on the market in time for the Christmas 2004 campaign.

Digital Radio in Germany

The congress analysed the development of DAB in Germany. Of the 150 stations broadcasting in Germany today, 25 do so exclusively on DAB, and the trend is for the number to rise as the date for the analogue switch-off, scheduled for the year 2015, draws near. With regard to receivers, the stock in the stores comes to 70,000 units, but the figure is expected to rise to 200,000 in time for the Christmas 2004 campaign. However, the general impression is that the country has yet to reach a 'mass' introduction of receivers as has occurred in the UK.

Initiative Marketing Digital Radio (IMDR), an association that brings together 22 public and private members (broadcasters and manufacturers), has been working for some time on merchandising initiatives to promote digital radio in Germany. Its website offers very detailed information aimed at listeners (receivers, coverage, points of sale, etc.): www.digitalradio.de

With regard to the development of new value-added services, the content most likely to capture the public's imagination is traffic information, track titles and artist names, webcam images, stock-market values and weather forecasts. Blaupunkt currently offers these services through the Woodstock DAB 54 model and a PDA using a bluetooth connection.

DAB from a Distributor's Point of View (COMET, United Kingdom)

COMET is the second-biggest distributor of home appliances and electronic consumer goods in the United Kingdom, with 255 points of sale across the country. The

sale of digital receivers was promoted as a response to a market stuck in conventional radio. After October 2003, DAB sales began to overtake those of FM and today DAB receivers represent 40% of sales volume (in units sold) and 73% of sales value (in pounds sterling).

Radio is a very popular medium in the United Kingdom and the main reasons for buying a digital receiver were the supply of new radio broadcasts and the advantages of the digital system. Furthermore, the awareness campaigns organised by the BBC, the DRDB and the commercial stations have been very effective.

From the sales point of view, they have placed a great number of prominent product displays with information on DAB, and used programming guides, prizes for the best salesperson, a distribution website with product information, organised travelling campaigns, above-the-line advertising, promotions during sporting events, etc.

The United Kingdom, the DAB Pioneer

The WorldDAB Forum once again highlighted the successful initiatives taken in the UK with regard to digital radio. There are currently a total of 385 digital radio broadcasters (national, regional and local) and receiver sales are expected to hit one million units by the end of the year. The kitchen-receiver market grew 50% in the past year and there are cars in the UK that offer a DAB receiver as an optional extra. One of the features that people like most is the fact they are easy to use and studies have found that 43% of the British population now know about digital radio, up from 16% in 2001.

The Radio Supply in Catalonia, Between Maturity and Crisis

Josep M. Martí

- *The supply market for radio productions in both Spain and Catalonia is currently presenting symptoms of maturity and crisis. This is not a contradictory statement but rather the logical consequence of an assessment of the sector's evolution over the past 20 years, a period of significant deregulation of radio activity and where specific legislative and regulatory policies have been developed by the two Administrations involved, i.e., State and Catalan, which have configured a radio sector considerably different to the one of the late 1970s.*

Catalan radio broadcasting can be analysed in different ways. If we look at it from the industrial point of view, we could say that it is made up of an important number of public and private companies operating on an uneven playing field that favours the former, and an imprecise number of frequencies, which some analysts put at more than 3,500, established in an unequal fashion across the land. If we analyse it economically, we see that the industry enjoys double funding: from public aid and from advertising, making it hard to assess its real economic weight, as there is no reliable figure on turnover.

If we analyse radio in terms of the medium, we would say that it comes second among the major media in terms of audience size, with a daily penetration rate over more than 60% of the population¹; a weight which coincidentally does not correspond with advertising investment, as it receives a

much smaller percentage (around 10%²) and yet even still is one of the highest among European countries.

The Catalan radio sector is very fragmented. The supply is very diversified. Firstly it forms part of a large State market, insofar as public and private stations of a Spain-wide scope operate within Catalonia, working in a way similar to American networks, i.e., with State, regional and local programming. Secondly, Catalonia has its own national market, which includes regional and municipal public stations as well as autochthonous private groups. Without having a need for comparative statistics to hand, I would say that nowhere else in Spain is the autochthonous supply as important in terms of quantity or, in particular, variety.

It seemed important to me to begin this article with a reminder of the general situation because we are very often tempted to talk about stations and programming while systematically forgetting the context in which activity is developed, i.e., the market of supply and demand, and also the decisive role that external and international logics play with regards operator strategies, as I have said before on other occasions³.

Factors that Explain the Maturity

We can talk about a radio market being mature when it seems difficult, if not impossible, for its overall size to increase and in particular for the number of operating frequencies or transmission powers to grow. When we reach this situation, technical experts refer to the saturation of the radio spectrum. In this context, it does not seem possible for the number of operators either in the public or private sector to grow and thus supply to increase. From this point on, all the indications would suggest that the only

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transformations the market could experience would be related to its resizing, i.e., changes in the structure of some stations as a result of the application of business-efficiency policies or new supply strategies from the same operators based on the implementation of new transmission supports, essentially digital radio.

We can specify the maturity of a market in terms of programming supply based on an analysis of a number of internationally accepted indicators, using a heuristic methodology⁴:

1. Number of stations available to the audience on the main markets and submarkets.
2. Distribution of existing stations among the different station models (full-service and specialist radio).
3. Evolution of station supply, particularly analysing the average implementation time that the most popular stations once needed to reach their audience share.
4. Comparison indices with other consolidated radio systems expressed in terms of similarity of the most relevant data: penetration and audience segmentation, advertising segmentation and standardisation of the strategies of the main operators present on the market.

With regard to the first point, I have already said that the Catalan market is getting close to, or may have already passed, saturation point. The almost immediate consequence of this usually is that we can see the crisis besetting new operators who compete with stations that have been on the market for years and which are very consolidated both in terms of audience and advertising. A fairly clear example of this can be seen in the full-service segment, in which one can see the difficulties that new stations such as COM Ràdio, RAC 1 and Ona Catalana are having in capturing significant market shares.

This penetration problem is due to different factors that we should bear in mind and which essentially use the same station model, even though the new public and private operators regrettably often undervalue them. The most important include the historic weight of station brands and the presenters of the main programmes; the level of social recognition of the aforementioned brands; the loyalty habits of the audience with regards programmes made by successful stations; efficiency in managing production

resources and the share of historical advantage in penetrating the advertising market. Despite the difficulty of this context, many business projects have systematically forgotten that first of all they should draw up business plans which take into account the difficulties that could arise when they enter supply markets where positions are very consolidated. In other words, it is important to firstly offer differentiated programming, realised at assumable costs, and to have the capital needed to keep afloat for as long as it takes until you achieve a significant market share.

Having made this first point, another thing that comparison indices with other radio systems tell us is that, despite the existence of differential factors linked to historical and cultural questions and the application of particular legislative policies, a national radio market structured in a fashion similar to another one tends to develop the same behaviour patterns and suffer from the same problems.

The consolidation of supply is particularly important on the Catalan talk-radio market, which is why the process of new stations' obtaining significant audience shares and later advertising is slowing down in a way that is putting the operators' capacity for economic resistance to the test. We already know that for some of them, mainly public ones, this factor may not be particularly important as they do not operate on a basis of economic efficiency but rather operating costs, but for private ones the time they must wait before obtaining a significant presence on the market is of paramount importance as talk programming tends to be very expensive.

The Crisis: Strengths and Weaknesses of the Catalan Market

Having reached this point, we should now answer the question of whether the saturation of supply in the Catalan radio sector will sooner or later lead to a crisis. The answer is: not necessarily. The condition to ensure this does not happen is for the industry overall and operators in particular to stay on their toes and respond to what they see. It is important to make an in-depth reflection, analysing their strong points, weak points and the opportunities that could arise in the immediate future, particularly those related to the implementation of new transmission supports, i.e., mainly, as I have already said, digital radio.

So what are the strong points? Radio in Catalonia is a socially recognised form of communication. Its reporting task and ability to generate discussions compared to the generally increasingly discredited medium of television are not in doubt. If from the business point of view its excessive fragmentation is a handicap, from the social point of view it is a positive attribute as people consider it is more grassroots and closer to their concerns. In many studies⁵, radio is seen as a credible medium that forms part of the day-to-day life of a great part of the population. Many studies have found its variety is also considered an asset, i.e., listeners know that supply is fairly broad and it is easy for them to choose what they most like listening to at any time. The relationship listeners generally have with their radio stations is one of loyalty: you only have to look at how little the ratings for each station have changed in the past few years to see that.

From the political point of view, it is considered to be a very influential medium. Many public policies and strategies in recent years have involved taking direct or indirect control of public or private autochthonous radio groups. They also have the image of being an important instrument of linguistic normalisation (although less than television) and as such at least 50% of FM programming must be made in Catalan, as must 25% of the music played.

It is also important to look at its weak points. The Catalan radio market is growing in supply⁶, but not consumption⁷. This could be a good headline for summing up the sector's chief weakness. The figures speak for themselves: we are talking about nearly 10,000 inhabitants per frequency (bearing in mind that the US has 30,000 inhabitants per frequency) but only just over 60% of people aged over 14 say they listen to the radio every day.⁸

However, neither policymakers nor operators are in the habit of taking much notice of statistical figures, with the latter tending to think they have spotted a gap in the market. Over the past 10 years, three new full-service stations have started up (COM Ràdio, RAC1 and Ona Catalana), competing directly with the pre-existing ones (Catalunya Ràdio, COPE, Onda Cero-Onda Rambla, Ràdio 4 and RNE1). No other market in Spain has such an abundance of competition in the same segment.

Furthermore, the audience for this type of programming has not grown significantly over the same time period, which leads one to think that the new stations have not created

new listeners but have simply stolen them from the stations that existed before. This strategy of direct competition undertaken by some operators does not seem to have borne fruit if we take into account the meagre results obtained to date from the process of urgent restructuring that most have been forced to carry out.

The last five years have also seen important changes in supply in the specialised radio segment, particularly by broadening the coverage of already existing stations, mainly in the Barcelona metropolitan area, which have made them into de facto Catalonia-wide stations. Competition has grown significantly in the sub-segments, particularly in music stations, as table 1 shows.

A quick look at this table shows firstly the large number of specialised stations of all types on the Catalan radio market, and particularly the modifications made in the coverage of some of them, which has allowed them to win a potential market share.

In line with other arguments made in this article, we can see that the above table can again justify the saturation of the Catalan radio market, but with distinctions, as, while in the case of full-service radio there are eight stations competing for the same market segment, in the case of specialised radio the segmentation possibilities are much more dispersed and competition much more widely spread, even though even a cursory glance at the list above may strike one as excessive for a market the size of the Catalan one.

In keeping with the arguments of other authors⁹, I have been saying for years that the segmentation process in radio has been moving in line with the rise in the supply of the number of stations. The current saturation in Catalan radio could be defined as a transitional stage between the possibility the listener has for choosing from a wider range of products on offer (i.e., "the right station for everyone") and an immediate future in which digital radio will make it possible to choose stations "in line with people's interests and particular music tastes"¹⁰

The behaviour of the Catalan supply market with regard to specialised radio is similar to that of the radio models in more competitive countries, in which we can see that the percentage of specialised formats addressed at audience segments aged 25-40 are growing inexorably. The operators justify this option by repeating that they are the most sought-after by the big radio advertisers, as this segment of

Table1. Changes in the Coverage of Specialised Stations

<i>Stations that have not substantially modified their coverage</i>	<i>Stations that have substantially modified their coverage</i>
Catalunya Informació	Flaix FM
Catalunya Música	Ràdio Flaixbac
Catalunya Cultura	Ona Música
Radio Clásica (RNE 2)	RAC 105
Radio 3 (RNE)	Radio Tele Taxi
Cadena 40 Principals	Hit Ràdio
Cadena Dial	Ràdio Intereconomia
M80 Radio	Ràdio Estel
Ràdio Club 25	
Europa FM	
Màxima	
Cadena 100	

Source: author's own work.

the population includes some of the most hardcore consumers. The structure of the specialised-station supply market in Catalonia matches the trend we can see in countries with more competition.

Table 2 is open to many interpretations and speculations. Firstly, the history of the past 20 years explains why operator strategies have been very imitative in terms of music stations, i.e., they have chosen to develop competitive formats that have highlighted important audience segments. 20 years ago that meant that everybody tried to make clones of the Top 40, but over time they have realised two things: firstly, that people aren't keen on copies and secondly, that the oldest end of the target group, i.e., 24-26 year olds, tend to migrate to other formats when music stations for an older audience are available. This phenomenon was experienced in the US and gave rise to the 'adult contemporary' (AC) format.¹¹

We could say that the rise in the number of these types of formats is a common phenomenon on European markets that are growing or that have reached important saturation levels in the supply of music stations. The second aspect to take into account in this regard is that the umbrella term 'AC'

Table 2. Types of Specialised Radio Formats in Catalonia

<i>Hit Lists</i>	<i>Adult Contemporary</i>
Cadena 40 Principals	<i>Music</i>
Flaix FM	M80 Radio
Cadena Dial	Ràdio Flaixbac
Cadena 100	Ona Música
	RAC 105
<i>Formats Specialising in Information</i>	Hit Ràdio
	Europa FM
Catalunya Informació	Ràdio Estel
Ràdio Intereconomia	Ràdio Club 25
<i>Mixed Formats</i>	<i>Classical Music</i>
Catalunya Cultura	Catalunya Música
Radio 3 (RNE)	Radio Clásica (RNE 2)
Radio Tele Taxi	

Source: author's own work.

includes different and varied types of music, potentially making it more expensive to programme different types of music for adults. Table 2 demonstrates this: there are some stations that strictly obey the AC format while others are closer in style to 'golden oldie' stations, i.e., rock and pop from the 1960s and 1970s.

In general, we could say that the specialised radio supply market is still open to new proposals that could cover demands not meeting potential audiences. In reality, operators still opt for proposals that may interest more specific sectors, not just among people who regularly listen to the radio, but also among people who do not.

Niches, the Hope of the Future

I have already used this article to describe the difficulties some operators have in surviving on a mature market, particularly full-service radio. I also think specialised radio is the only part of the Catalan radio spectrum able to find a way out of a possible crisis and, particularly, positive expectations for the future.

My idea is simple. Historical experience of reference markets shows that in the face of saturation, the only way forward is differentiation. The consumption of cultural goods has a number of characteristics typical of all consumer products: audience segments are still too broad and undefined for particular products. Experts seek niche markets, i.e., more precise groups of listeners interested in increasingly more specialised stations and which are usually attractive to advertisers.

Niche programming has other advantages, too. Production costs, particularly in the case of music stations, is one advantage. What is required is to make a good design of the format, and test it out beforehand on potential audiences¹². In most cases, transmission can be automated. Secondly, niches are the threshold for digital radio, as the people who announce this new transmission support say that the number of stations available to an audience will be even greater. My idea would therefore be to prepare station supply for a new situation that will enable Catalan radio to have a good head start in DAB.

In short, we could say that if the Catalan radio system wants to prevent the negative effects of saturated supply, it will be necessary for operators to diversify and seek new programming niches and audiences, otherwise the crisis could have negative consequences in the short and medium terms. Everything seems to suggest that over the next few months we will witness important changes, particularly bearing in mind that, following the granting of the latest licences, the implementation of digital radio will considerably raise the limits of the supply market and the complexity of its production and funding.

Notes

1. 63% of people aged over 14, according to the General Media Survey (EGM).
2. Source: Infoadex. *Study on Advertising Investment in Spain in 2003*.
3. MARTÍ, J. M. 1995. *Modelos de programación radiofónica*. Barcelona: Feedback, and also MARTÍ, J. M. 2000. *De la idea a l'antena. Tècniques de programació radiofònica*. Barcelona: Proa. Eines de periodista.
4. We are mainly talking here about the evolution parameters of radio systems that have undergone similar growth processes.
5. For example, a recent survey by the Catalonia Broadcasting Council (CAC).
6. It is not my intention in this article to analyse the growth in the number of frequencies available to operators, particularly commercial operators; the current number of frequencies is around 700, including public, private and other ones (associate, free, pirate and educational).
7. As EGM figures from recent years show.
8. EGM 1st trimester 2004.
9. Bellanger, P.C. 1992. *La radio du futur*. Paris: Armand Colin.
10. Martí, J.M. 2003. "La radiodifusión en el horizonte del tercer milenio" In: LÓPEZ, N.; PEÑAFIEL, C. Eds. *Odisea 21. La evolución del sector audiovisual*. Madrid: Fragua.
11. Kelley, D. 1995. "The AC Format". In: Martí, J.M. (editor). *Nuevos formatos de radio en USA*. Barcelona: SER, Fira de Barcelona-Sonimag.
12. A good example is the format that Kiss FM offers in Spain, designed by the American production company, Broadcast Architecture.

Who's Afraid of Local Radio?

Montse Bonet

■ *Catalan local radio is going through a period of uncertainty and, at the same time, certain euphoria. The Pilot Plan and the last political changeover have introduced a number of modifications to what had seemed to be an inexorable trend towards business and/or programming concentration and network broadcasts as a productive form of survival. In any case, we can see that a certain terminological change has been taking place for some time, including a preference for using the word 'proximity' instead of 'localism'.*

The first part of this article reviews different historical parameters in the classification of local radio, while the second part takes the pulse of the current situation.

In Catalonia, I shouldn't think anybody would be afraid of local radio. Just when we had got used to the loss of single-frequency stations and the formation of networks, along comes the privileged observatory that is Catalan radio to offer us a new panorama that I find slightly worrying. A panorama of a certain and supposed revival of 'localism' that emphasises two elements: firstly, "thanks" to the Pilot Plan and music stations (Anglo-Saxon in design but offered in Catalan) new music stations have arisen, even though they are small at the moment; and secondly, a study published by the Catalonia Broadcasting Council found that local stations are the second-most-listened-to stations

behind Catalunya Ràdio. If anybody thought that the supposedly modern inventions of the 21st century would sound the death knell for 'localism', they were wrong. Although I should say that 'proximity' appears to be the word de jour that is gaining ground over 'localism'. This is not the first time local radio has been discussed and nor will it be the last, but it might be useful to review the state of the situation, as we have no idea how long it will last. I shall thus begin by reviewing some of study parameters and diverse terminology and then take the pulse of the situation as it stands at the moment.

Local, by force

Radio in Catalonia (and the whole of Spain) was never as local as when it could not be studied, i.e., under Francoism. Nearly all the stations were full-service broadcasters rather than music stations. In fact, a brief review of the history of broadcasting in Catalonia shows that radio was originally local, i.e., with weak transmissions that did not permit large-scale territorial coverage. With the exception of the early private MW provincial stations¹ that existed in Spain and the public broadcasters (once RNE had appeared), broadcasters used low-power transmissions. We should remember that the impossibility of forming a national broadcasting service (and thus ensuring radio reached everybody) came about because of the 1932 Decree that determined the establishment of local radio par excellence in Spain, i.e., the maximum authorisation of 200 watts and no more than one broadcaster per town. It could therefore be said that radio expanded in Spain at the hand of local stations.

After the Civil War, when Radio Nacional de España began, localism became the perfect solution for the new regime, as it made it possible to satisfy different political

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groups and factions (the establishment and excessive proliferation of new broadcasters) while at the same time guaranteeing control through the use of transmission power. As we know, Francoism forced broadcasters (except RNE) to be local even with regard content. The Order of 6 October 1939 completely prohibited broadcasting news beyond the local, provincial or regional sphere. Localism, at least in terms of geographic area, could thus not exceed the province (and this depended obviously on the orographic features of each zone).

The comparative problem with regard to transmission power remained the same throughout the Francoist period and beyond, not only on MW but also on FM, the band wave that is local by nature, as it has a more limited wave scope than any other. Localism was thus an imposition, obligation and form of control: a solution that was to be provisional but which was maintained over the years. The other parameters that historically had been used to determine whether a radio was local or not were language (once languages other than Castilian were able to be used) and share structure (very open to discussion and relative).

Other Radio Stations and Technological Possibilities

With the arrival of democracy, new voices appeared on the scene: regional radio, municipal radio, associative radio of all types, free radio, pirate radio, etc. In this period, the following events occurred which, whether new or inherited from Francoism, introduced the first fissures into a style of local radio that had been heavily defended and maintained throughout the previous era. They included:

a) During the early days of the Transition and democracy, the correspondence between radio type and State configuration was continued. "(At that time) it met a principle of building a backbone of democracy that was essential and in each area of democratic political participation there was a public broadcasting resource that established a basic harmony between the configuration of the State and the radio system, a principle also met in the private sphere, at least theoretically" (Prado, 1994:236). The most noteworthy feature was the appearance in the early 1980s of the first regional radio stations, along with a

new territory and political reality in the shape of the autonomous communities.

b) One of the most important and decisive features of the current situation of Catalan radio (and Spanish radio in general) has been the relationship between the radio industry and advertising. Radio has accepted advertising as a source of funding since the beginning (and I will not here go into the controversy about the doubling funding of public radio). If we take into account that the new Spanish regulation that began in the 1980s only went some way², we can see that the change in regulations affected the radio sector (Bonet, 1995: 426) and fostered an opportunity that did not correspond to market reality and opened the door to concentration. Exiting a numerically large sector built on ideological parameters and now subject to the laws of the free market led to the battle that has translated in the past 20 years into mergers and takeovers and, consequently, concentration. Network broadcasts (or station broadcasts, if you prefer) are not new - in fact, they have always been around and were a permanent reality during Francoism, although they didn't happen very often. Network broadcasts as we understand them today date back to the mid-1980s and were particularly favoured by the appearance of new technologies such as satellite, which guaranteed State coverage, even though the connected broadcasts were local in essence and power. Localism suffered its first significant fissure because of network broadcasts, implemented to cover as much territory as possible to guarantee maximum audiences, because big advertising investors wanted big markets.

c) The appearance of new voices and the reality of other countries led to a confusion about terms. Just as nearly everyone had got used to calling the same kind of radio 'local', new municipal stations, free radio stations, associative (cultural or otherwise) stations, neighbourhood or district stations and others appeared and terms more commonly used in other political and social realities were imported, including 'community radio', 'popular', 'alternative', 'participative', 'educational', 'rural', 'communal' radio, etc.³ Stations could now be classified according to whether they met the regulations (they could not be considered clandestine, as the political situation was one of freedom), their form of management, whether they were non-profit, etc. Of course they all had a common denomi-

nator, i.e., small and short coverage, but for the purposes of social motivation they worked *with, in or for* small communities (neighbourhoods, rural communities, classrooms, etc.). Democratic localism had a key role during the Transition as a motivating force or element of cohesion and as a way of reinforcing democracy and recovering local languages and cultures.

Later on in the democratic period, as new “small” voices emerged and the local stations that had already existed were concentrated, the natural barriers of territorial scope were overcome thanks to new technologies. Private radio stations entered a spiral of competitiveness and a battle for the advertising dollar that diminished ‘local’ transmission times. There was a slow move from *network broadcasts* to *breakouts*, which shows how priorities had begun to change.

To further add to the confusion, in recent years the private sector has preferred not to use the term ‘local’, thinking, perhaps as in the case of television, that it is too heavily associated with ‘unprofessional’, ‘uncompetitive’ or ‘amateur’, or even to prevent the mental image of the minimum or reduced coverage that the thought ‘local radio’ provokes. On the other hand, the questions and doubts raised about local radio in various parliamentary interventions have always referred to municipal radio. “Until recently, the basic question was whether or not Catalan radio (or the radio of any other point in Spain) was local. Now, in the last quarter of 2002, the question should be whether or not Catalan radio should continue to be local. (...). In other words, to survive, commercial Catalan radio is forced to abandon localism and reduce it, where appropriate, to the sphere of content. Given the ambiguity of this issue, radio prefers (like other media sectors in general) to use the word ‘proximity’” (Rabadan; Bonet; Guimerà, 2003: 218). Private Catalan radio stations (like their Spanish and some European counterparts) have had to sacrifice localism to get the broadest coverage they can in order to survive.

‘Local’ is the only adjective that does not refer to a particular political and/or administrative division (unlike ‘municipal’, ‘regional’ or ‘national’). The only thing everybody appears to agree on is that it refers to a radio reality of a smaller scale, almost at the bottom (or the top, depending on how you look at it) in the territorial-scope scale. Saying that a radio station is ‘local’ is as common and at the same

time as ambiguous as saying it is European. Thus a large factor in the success of the word ‘proximity’ is the fact it is new, does not recall earlier times and allows a more sharply defined mental picture about the new media reality, i.e., ‘localism’ in terms of content. If satellites and the Internet mean that the world is in our hands, regardless of where the message comes from, what is it that makes a listener feel they are in proximity to a station or not?

Globalism, Networks and Proximity

There is a great deal of complexity surrounding the radio sector, which not only has to combine localism with economic profit but must come to grips with new terms and realities, including globalism, proximity and the Internet.

From among the very many interpretations of the word, we could consider ‘globalism’ as the name of the new phase of the internationalisation process that began many years ago. All of these realities have their opposite. Oddly enough, the opposite of internationalisation, transnationalisation, globalisation, etc. is always ‘local’. The now-famous expression for defining the intersection between these opposites, i.e., *glocalism*, continues to be “think globally, act locally”. However, this expression is clearly determinist as it transfers the interpretation of the world to a particular centre, i.e., global, while localisms can only act or apply what has already been decided. The real debate should be about whether the global world could be interpreted from the point of view of localism. As Castells said, although the media are interconnected at the global scale and programmes and messages circulate on the global network, we are not living in a global village, but rather in individual homes produced at the global scale and distributed locally (Castells, 1997: 374).

In this society-network that Castells and other theorists say we are building, the concept and interpretation of the world, as well as the communication process, are undergoing a generational change that even the classic media do not always know how to interpret correctly (sometimes they can’t even detect it). Internet and mobile phones, as the terrorist attacks of 11 March showed, are new sources of information and intoxication, but above all they are an alternative. If, for example, pirate stations broadcast in Hw,

Table 1. Number of Radio Frequencies in Catalonia (1999-2004)

<i>Broadcasters</i>	<i>MW</i>	<i>FM 2004</i>	<i>Total</i>
Public institutional (CCRTV and RTVE)	9 (all from RNE)	240 (171 from CCRTV and 69 from RNE)	249
Municipal stations	1 (COM)*	220	221
Others**		80	80
Private sector	12	94 (+ Pla Pilot)***	106

Source: Author's own work, based on the chapters "Radio" and "Local Communication" in the Report on Communication in Catalonia 2001-2002, broadcasters found in the Radio Guide [online edition] <<http://www.guiadelaradio.com>>; COMEmissores [online] <<http://www.comemissores.com>>; the Federation of Local Radio Organisations of Catalonia [online] <<http://www.fedcatradio.org>>; the Directorate General of Audiovisual Communication [online] <<http://www.gencat.es/dgrtv>> [consultations: April 2004], and personal conversations with people working in the sector.

* I know that it is not very orthodox to put MW stations in the section of municipal stations, but a) with regard to coverage, Ràdio Sabadell was originally local, b) in terms of programming, COM Ràdio uses a municipalist model.

** 'Others' includes various radio initiatives (associative stations, free/pirate stations and some educational stations).

*** There is no official list that refers to the Pilot Plan, but some 'non-official' lists indicate it could include a hundred frequencies.

they are local. On the Internet they are no longer pirate or illegal... but are they no longer local?

Proximity (localism through content) even in a period when the Internet (network broadcast) has become an indispensable tool in radio production for survival can correspond to what Castells (1997:29) says about the schizophrenia of our time: "Our societies are increasingly structured around a bipolar position between the network and the 'I'". A type of schizophrenia which is also being experienced in radio, with the need for network broadcasts to attract large audiences and the constant fragmentation and specialisation of these audiences. 'Traditional' localism is a successful way to fragment audiences via coverage, which is why the new word, 'proximity', is more in line with today's concerns, i.e., the fragmentation of values, ideology, tastes and takes on the world. With a broad supply and the help of technologies, the world is within reach in a few seconds and hence the criteria audiences use to choose stations vary.

Catalonia: Where All Models Are Possible

If I had to explain the state of local radio in Catalonia (no easy task), I would have three basic options:

a) To refer to frequencies and talk about connec-

tion/breakout times;

b) To suggest models, types and a timid approximation;

c) To look into why Catalan listeners do or do not feel that stations are 'proximate'.

I do not have much space left to review the first two, although I would like to mention the need for new research into the local/proximate sphere⁴. I will instead try to draw a diagram of Catalan radio today. I apologise if this analysis is not terribly precise, but there are some lists that are still not official. From the quantitative point of view, as the situation becomes more standard, it is increasingly difficult to 'officially' know how many frequencies are present on our airspace. Between the Pilot Plan (which not only includes private stations but also COM Ràdio) and pirate stations, associative stations of all types, etc., lists are missing. Lists are missing and a plan that awards many broadcasters a definitive legal framework is also missing. On the other hand, there is no doubt that Catalonia is a good observatory for studying radio and its variations, as it certainly is not lacking any type of broadcaster.

From the quantitative point of view, i.e., frequencies, the figures have remained the same for years. In the private sector, since the last licence was granted after the Royal Decree of 1997 and with only a slight variation, we can talk about Catalonia in the quantities shown in Table 1.

Table 2. Municipal Broadcasters in 2004

<i>Municipal broadcasters (220)</i>	<i>Quantity</i>	<i>Others</i>	<i>Total</i>
Only associated with COM	82	+17 + 7 others + OM	COM = 107
Only associated with the Local Radio Federation of Catalonia	53	+ 17 + 8 others	Federation = 78
Members of both COM and the Federation	17		
Members of neither	68		

Source: Author's own work based on COMEmissores [online] <<http://www.comemissores.com>>; the Local Radio Federation of Catalonia [online] <<http://www.fedcatradio.org>>; the Directorate General of Audiovisual Media [online] <<http://www.gencat.es/dgrtv>> [consultations made in April 2004 from a list most recently updated on 19 February, according to a direct consultation with the Directorate General].

Note: To COM and the Federation I added the 17 stations that belong to them both. I further added OM, formerly Ràdio Sabadell, to COM, along with seven other non-municipal broadcasters. I added eight non-municipal broadcasters to the Federation (in both cases they are associative stations).

Among different municipal and associative stations (not including pirate stations), there are around 100 frequencies associated to COM Ràdio, as well as the 80 or so that are members of the Local Radio Federation of Catalonia. They are, in any case, the most genuine demonstration of what local public radio could be understood as, although with distinctions, as neither are strictly radio stations. COM Ràdio is not a station but rather a programming brand created and managed by a public organisation, the Local Communication Agency⁵, which arose, not without controversy, in the mid-1990s and which has always taken the view that it does not make network broadcasts (banned by law⁶), but rather offers municipal and associative stations the chance to connect to its satellite to broadcast their programmes. For its part, the Federation, in the same vein of programme management, offers its federated broadcasters the possibility of choosing programmes (known as the Support Programming Catalogue) to round out their local programming, offered through agreements with Catalunya Ràdio, Catalunya Cultura, the federated broadcasters, the Estrader Nadal Group (World Wide Radio) and the private firm Fritz Hermann (which also manages sending programmes to broadcasters and offers advisory services, call-sign registrations, etc.).

As far as the private sector goes, the Pilot Plan has substantially changed the price of single frequencies, which until recently were pursued and tempted by nearly all the big

channels. If they could get a frequency to work temporarily as a repeater, there would be no need for an associate. This meant that some small owners pulled out of the agreements and joined the 'traditional' associated frequency and some joined the Pilot Plan in a mini channel. Three small music stations arose from this new phenomenon, two of them Catalan (Styl FM and Gum FM) and one that originated in Andorra but was also present in Catalonia (Pròxima FM). Styl FM stems from the same frequency that was until recently associated in Manresa with Flaix FM. Gum FM stems from the broadcasters associated to Ona Catalana in Vall d'Aran and Ribagorça, which belong to the Catalana i Aranese de Telecomunicacions Group. Finally, Pròxima FM belongs to the R7P Group in Andorra; R7P Ràdio was established in 2001 and by late 2003 the station that had been known as R7P Fórmula became Pròxima FM, broadcasting in Andorra and which bought the Seu d'Urgell frequency in Ràdio Valira. All three are music stations.

Table 3 shows briefly but clearly the supply of private Catalan radio stations in early 2004.

I know I have not included Kiss FM, but indications are that it will shortly exit the Catalan airspace (unless, of course, it reaches an agreement with someone).

To be honest, without knowing whether the Pilot Plan will be consolidated or in what fashion, it is impossible to make commentaries or forecasts without having more information,

Table 3. Supply of Private Catalan Radio Stations (2004)

<i>Name</i>	<i>Stations</i>
SER	SER Convencional, 40 Principals, M80 Ràdio, Màxima FM, Dial
COPE	COPE Convencional, Cadena 100
Onda Cero Rambla	Onda Cero Rambla, Hit Ràdio
R. Salut-Europa FM	Europa FM
RKOR-R. Intereconomia	Ràdio Intereconomia
RAC	RAC1, RAC105
Ona Catalana	Ona Catalana, Ona Música
Flaix	Flaix FM, Ràdio Flaixbac
RM Radio	RM Radio, Radio Tele-Taxi
Ràdio Estel	Ràdio Estel
Gum FM	Gum FM
Styl FM	Styl FM
Pròxima FM	Pròxima FM
Segre Ràdio	Segre Ràdio
Ràdio Marina	Ràdio Marina
Ràdio Club 25	Ràdio Club 25
Xtra-FM*	Xtra-FM

Source: author's own work.

* Xtra-FM is the frequency in Jonquera that COPE exchanged with Onda Rambla in 2002. Together with some Dutch partners, they used the new brand with the initial aim of getting a clientele made up exclusively of tourists, primarily from the north of Europe.

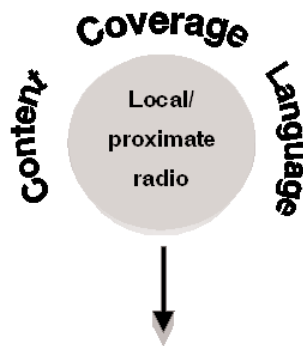
beyond the fact that it is time to recover local stations but via musical programming (with voices in Catalan, of course) and the information from the CAC study that showed local broadcasters were the second most-popular choice on the part of listeners⁷.

Finally, there is little more to be said about local digital radio beyond the fact that in November 2003 the names of the winners of the tender (called on 8 August) were announced for the 48 licences for the provincial and supra-provincial spheres in the Provinces of Barcelona (12 programmes), the Provinces of Tarragona (6 programmes), Montsià-Baix Ebre (6 programmes), Gironès (6 programmes), Segrià (6 programmes), Bages (6 programmes) and Osona (6 programmes).

As I said, without knowing whether the new radio landscape will get busier or not, rather than types of local radio stations, I would like offer a script model that could be used to better orientate a position within the media ecosystem which, as Castells said, moves between the network and the 'I'. Particularly in terms of radio, we should mention networks as a consolidated way of developing collaborations and relationships between stations, i.e., a network that could be interwoven on the basis of voluntary or compulsory connections or sharing programmes on an occasional or permanent basis. The following diagram could be used by way of conclusion to this brief report.

Script Models Better Than Types

Notes



Relationship with other radio stations (in the same company or not)

- Authentically local, in terms of coverage and/or content (many small stations are local but are music stations)
- Local in terms of breakouts (thus recovering original coverage or by awarding airtime):
 - from the regional network and/or
 - from the State network.
- Local in terms of advertising breakouts (always or at certain times during the day).
- In terms of connection (COM model, voluntary satellite connection).
- In terms of programme purchases or exchanges with other local radio stations.

We often find more than one of these models at the same time. For example, a State channel can have a regional or local breakout or a breakout for advertising only.

1. There are only nine MW provincial stations in Spain. They are EAJ-1 Ràdio Barcelona (SER), EAJ-2 Radio España in Madrid (currently the title of Cadena Ibérica), EAJ-3 Radio Valencia (SER), EAJ-5 Radio Sevilla (SER), EAJ-7 Radio Madrid (SER), EAJ-8 Radio San Sebastián (SER), EAJ-15 Radio España in Barcelona (whose original licence was awarded to the Ràdio Associació de Catalunya, would later pass to the Rato family and is now OCR in Barcelona), EAJ-29 Radio Intercontinental in Madrid and EAJ-101 Radio

Zaragoza (SER).

2. i.e., public sector of sizes above the European average, a private sector in the hands of the same businessmen, the appearance of more and new media in an advertising market that was not growing.
4. For further information on how research into local communication has evolved in Catalonia, I would recommend the valuable contribution of the UAB professor Josep Àngel Guimerà referenced in the bibliography.
5. COM is an initiative of the Local Communication Consortium, made up of the Provincial Government of Barcelona, the Association of Municipalities of the Metropolitan Area (31 municipalities) and a further 98 city councils, as well as EMUC (Municipal Broadcasters of Catalonia). In late 1994 the Consortium created ACL (the Local Communication Agency) to manage programming and other activities associated with local communication.
6. Point 3, article 3 of Act 1/1991 of 8 April on the Organisation and Control of Municipal Radio Broadcasters says: "The broadcasters referred to in this Act may simultaneously broadcast the same programme either made internally or produced for other public broadcasters, respecting the matters established in the section above and in no case may form part of a network broadcast".
7. The CAC already showed in the results of its survey on questions about different types of radio stations that a considerable percentage of people responded 'don't know/no response' - sometimes more than 60%. Another datum: we can talk about local radio stations, but the people surveyed did not identify them (or at least did not express it in this study). Furthermore, the percentages corresponding to 'another station' were also considerable (more than 20% and 30% in some cases) and they were not identified either. In fact, this only corroborates what we have known for some time: that radio surveys, particularly the General Media Surveys (EGMs), are always damaging to local radio, given the concept of State coverage with which many (although not all) are prepared. At the time of writing, the new "Catalan EGM" had just appeared, which perhaps may provide more precise figures (it was launched on 13 April).

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Radio in Catalonia: Uses and Perceptions

Joan M. Corbella

- *More than 70% of the population in Catalonia regularly listen to the radio, without much difference in terms of age, social class, level of studies or sex, according a 2003 survey by the Catalonia Broadcasting Council (CAC), the independent broadcasting authority in the country. The place of birth and the language people speak are the most influential factors in determining their listening preferences.*

The public broadcaster Catalunya Ràdio is by far the most listened-to station and the one held in the highest regard in almost all areas. Behind it comes SER, the most popular Spanish-language station in Catalonia.

Public discussions both in Catalonia and the rest of Spain on the social functions of the media traditionally focus on television and TV programmes and, to a lesser extent, newspapers. Radio, on the other hand, is awarded much less importance, even within the media itself, except when a radio station breaks a major story and the three times a year when rating results are published.

However, a significant part of the country's political, sporting and cultural life flows through the microphones and antennas of its radio stations, thanks to radio's immediacy in broadcasting events, its facility for being present where things happen and the abundance of interview space available for all types of public figures to fill a large part of the programming schedules. At particular times in political life, such as during the events of March 2003 (the terrorist

attacks in Madrid and the Spanish general elections), radio plays a central role in the media system. Good proof of this was the spectacular rise in the number of listeners in the 1st trimester of the 2004 General Media Survey (EGM) with respect to Spain¹.

In this framework of shoring up the role of radio, I would like to offer an analysis of the results with regards radio in the survey that the Catalonia Broadcasting Council (CAC) carried out in October 2003² on the public's perception of TV and radio programming and the different stations and broadcasters.

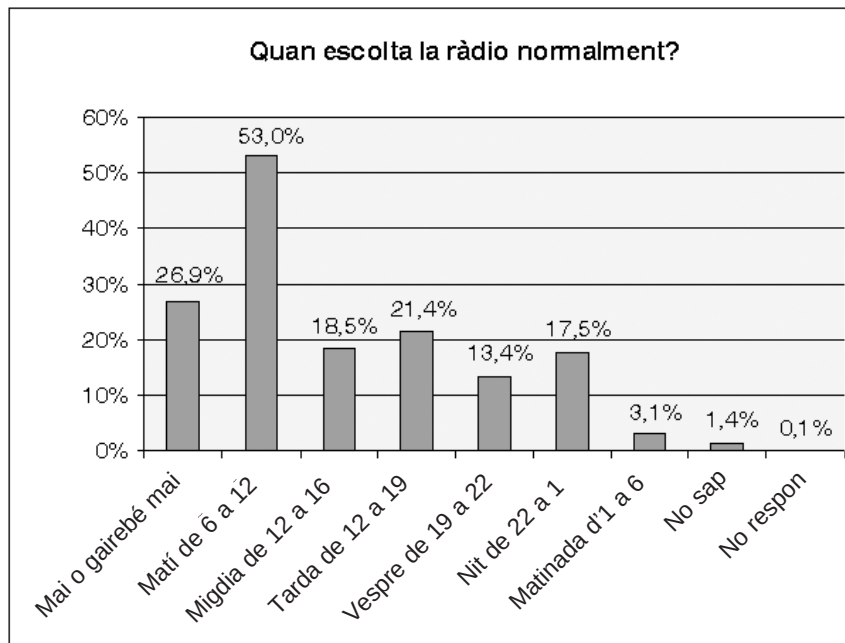
The study provides a string of data that makes it possible to examine the key uses of the medium based on different characteristics of the population, with remarkable differences in habits, and also to look at what the public thinks about the radio supply available in Catalonia, beyond the audience leadership that the EGM has been demonstrating for years with regard to Catalunya Ràdio and a good part of its programming in each time slot, followed by SER and way ahead of the other full-service stations, and 40 Principales (SER) with regard to music stations, followed by Flaix FM and Radio Tele Taxi.

Habits of Radio Use

Far from the overwhelming majority of the population who watch television every day (around 90%, according to most studies) but way ahead of the number of people who read newspapers on a daily basis (around 40% of people regularly read a paper, according to the EGM), the fact that more than 70% of interviewees regularly listen to the radio offers a first datum on the importance of the medium in Catalan society, without marked differences according to most sociodemographic variables.

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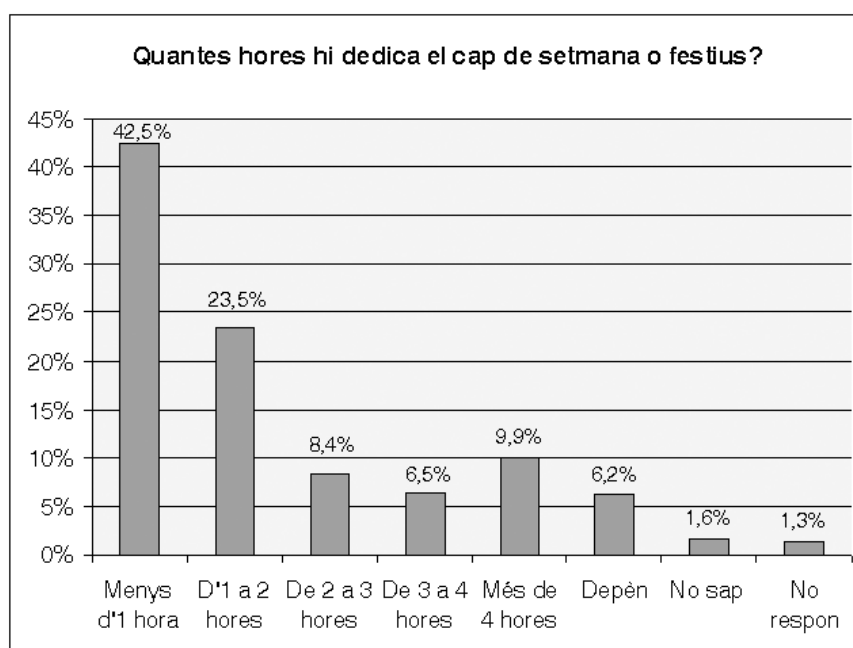


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The survey found that slightly more people born in Catalonia never listen or almost never listen to the radio than people born in the rest of Spain (26.9% and 24.3% respectively); that there is a slight rise in the number of listeners in line with level of education (28.2% of people with primary studies do not listen, while the figure for people with secondary studies is 25.9% and for people with tertiary studies, 23.8%), and that there is no significant difference between people who speak Catalan as their regular language and people who speak Spanish, nor with regard to the size of the municipality they live in. On the other hand, there is a more significant margin with regard to sex (25.6% of women do not listen to the radio, compared to 28.2% of men) and particularly the province they live in and their age. In the area of Barcelona, a quarter of the people do not listen to the radio, while in Girona and Lleida the figure is just over 30% and in Tarragona it rises to one-third of the population. By age, people over 64 (32.5%) and aged 18-24 (29.6%) are less likely to listen to the radio, while listening figures for people in the remaining age groups range from 23% to 26%.

With regard to the time that Catalans spend listening to the radio, the differences were more significant, and some are

particularly interesting. 22.6% of listeners tune in for less than an hour per day during the week, 44.5% between one and three hours, and 29.6% listen to the radio more than three hours per day. However, the consumption of people born in Catalonia is clearly lower than for people born in the rest of Spain: 25.2% of people born in Catalonia listen to the radio less than one hour per day, compared to 15.9% of people born in the rest of Spain; 43.2% of people born in Catalonia listen for one-to-three hours, compared to 47.9% of people born in the rest of Spain; and 28.3% of people born in Catalonia listen more than three hours, compared to 32.4% of people born in the rest of Spain. With regard to level of education, the highest percentage of people who listen to the radio for less than one hour per day have tertiary studies (27.5%, falling to 18.2% for people with primary studies). There is no great difference in the figures for people who tune in from one to three hours per day, while the progression is inverse among those who spend more than three hours listening. In relation to the language regularly spoken, the survey found there was a higher consumption among Spanish speakers: 20.1% listen less than one hour, 45.2% between one and three hours and 32.8% listen for more than three hours per day. On the other



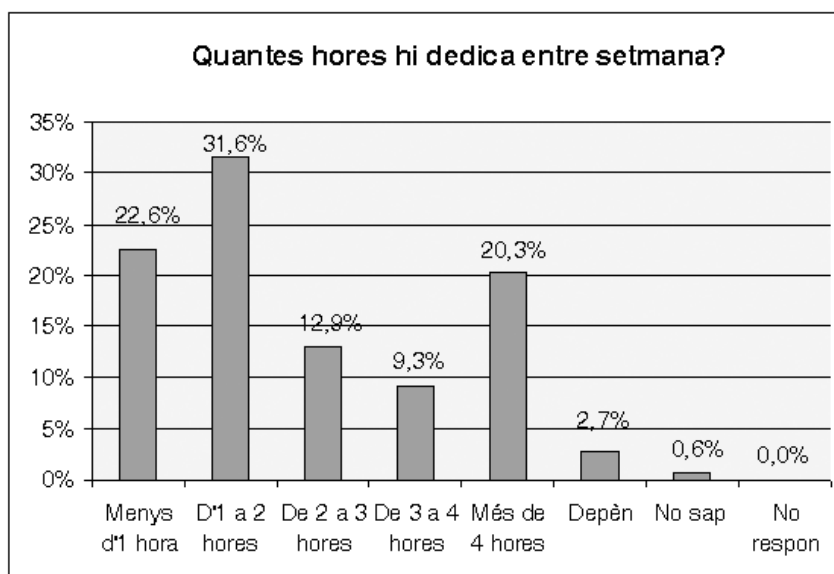
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hand, 23.2% of Catalan speakers listen for less than one hour, 44.6% for one to three hours, and 27.7% listen more than three hours per day. There were also noticeable differences in relation to sex, with a much higher consumption among women: 28.2% of male listeners listen to the radio for less than an hour a day, compared to 17.5% of women, and the relationship is inverse in the other groups (40.5% of men listen between one and three hours, compared to 48% of women, and 21.4% of men listen for over three hours, compared to 32.4% of women). By age, the survey found there was a fall in the number of listeners who tune in for less than one hour per day, from 40.8% of 16-17 year olds, through to 15.3% of people over 64. On the other hand, in the higher levels of radio consumption, the age variable did not record any definite patterns.

The survey offered another important figure in relation to audience times: the number of listeners falls sharply on weekends: 42.5% of listeners tune in for less than one hour per day on the weekends (compared to 22.6% on work days). The biggest listeners in the under one-hour group were people with secondary studies (48.9%) and tertiary studies (44.1%) and people who normally speak Catalan (46.5%) or both languages (45.9%), while Spanish speakers

came to only 36.8%; people aged between 18 and 24 (44.9%) and 35-49 (47.8%) and people living in towns of under 5,000 inhabitants (50.4%). The percentage of listeners who spend between one and three hours listening to the radio on the weekends thus fell significantly (31.9%, compared to 44.5% on work days), as did the people who tune in for more than three hours per day (16.4% compared to 29.6%), with few clear elements in terms of segments of the population. Despite the general fall, people who regularly speak Spanish were the ones whose weekend consumption fell the least, as well as people with primary studies.

With the aim of identifying the importance of radio in the Catalan media landscape, it is also important to mention audience variations throughout the day. Broadly speaking, the CAC survey coincided with information from the EGM, establishing the morning as the period in which most people listen to the radio: 53% of Catalans listen between 6 a.m. and noon, the radio prime time. There were no significant differences with regard to place of birth, language regularly spoken or size of municipality, but differences were perceptible in other segments: 61.8% of people with tertiary studies listen to the radio at some time or another during the



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morning period, a much higher figure than people with primary studies (52.7%) or secondary studies (50.3%). Residents of Tarragona listen less than other Catalans (45.9% compared to more than 50%). Among women, 55.9% listen to the radio in the morning compared to 49.9% of men and with regard to age, the groups aged between 25 and 50 had the highest percentage of morning listeners (60%) compared to adolescents (35.2%), young people (44.1%) and the over-64s (44.4%).

Throughout the rest of the day, radio is much less popular with Catalans. In the early afternoons (12-4 p.m.) radio consumption reaches 18.5% of the population, rising to 21.4% in the drive-time period (4-7 p.m.) before falling again in the evening (7-10 p.m.) to 13.4%, clearly coinciding with television's high point. Late-night (10 p.m. to 1 a.m.) radio listening rises again, despite the competition from the extended prime-time television period, when it captures 17.5% of the population.

It is important to mention a number of differences in this section by segments of population. By place of birth, more people born outside Catalonia listen to the radio in all time periods, the difference being significant in the early afternoon (23.9% compared with 17.6% of people born in

Catalonia), drive time (26.6% and 19.9% respectively) and late night (24.3% and 16.1%). By language regularly spoken, there were no differences in the morning, but for the rest of the day the percentage of listeners among Catalan speakers is clearly lower than that of people who speak Spanish or both languages. The situation in the late-night slot is interesting, when only 14.4% of Catalan speakers listen to the radio, compared to 22.2% Spanish speakers. In terms of education, the higher the level the lower the number of radio listeners in the early afternoon but the higher the number in the drive-time period (when 29.7% of people with tertiary studies tune in, compared to 20.1% of people with primary studies), while the night and late-night periods again have fewer listeners with tertiary studies. With regards sex, the percentage of female listeners exceeds that of men during the morning and early afternoon, but the situation is the opposite for the rest of the day, with the gap growing into the night, with 20.6% of men and only 14.7% of women.

In relation to age, apart from the morning period, around 20% of adolescents and young people listen during the rest of the day, except for the evening among young people (13.6%) and adolescents at drive time (5.2%). In the

Quina cadena de ràdio escolta amb més freqüència? I quina prefereix escoltar?

<i>Emissores</i>	<i>Ràdio que escolta amb més freqüència</i>	<i>Ràdio que prefereix</i>
Catalunya Ràdio	31,30%	21,40%
SER	17%	11,40%
COPE	8,40%	3%
Onda Cero	8,20%	4,50%
RNE	6,80%	3,70%
Radio 4	1,30%	0,10%
RAC 1	6,40%	3,20%
COM Ràdio	6,10%	2,50%
Ona Catalana	4,20%	1,10%
Catalunya Informació	7,60%	3,20%
Ràdio Local	17%	12,60%
Una altra cadena	18,90%	14,60%
No sap	5%	9%
No respon	1,40%	9,60%

Font: Consell de l'Audiovisual de Catalunya

segments aged 25-49, and again leaving aside the morning, the period with most listeners is drive time (26.2% of 25-34 year olds and 21.8% of 35-49 year olds), while the other time slots do not reach 20%. In the group of people aged 50 to 64, a quarter listen to the radio in the early afternoon and drive time, thereafter the figure falls significantly. Finally, among people over 64, after the morning the audience drops off substantially and does not exceed 15% except for the late-night period (20.1%).

To complete the analysis of the characteristics on listening habits among the population, I would like to make a brief reference to simultaneous activities, i.e., the activities people carry out while listening to the radio. All up, 42.4% of listeners tune in while carrying out domestic chores, 25.1% while working, 24.5% while driving, 20% while engaging in leisure activities and 10.2% during the time they devote to their personal hygiene. One interesting fact is that it is the youngest people who most frequently combine working and *listening to the radio* (always more than 30%) and that this practice is more common among people born in Catalonia (27.5%) than people born in the rest of Spain (18.9%).

Audiences and Station Preferences According to Place of Birth and Language Regularly Spoken

Catalunya Ràdio is by far and away the most listened-to full-service (i.e., non-music) station in Catalonia, as almost one-third of listeners mentioned it when asked ‘what station do you listen to most frequently?’ (31.3%), followed by SER (17%) and a long way ahead of the big Spanish stations (8.4% COPE; 8.2% Onda Cero and 6.8% RNE) and the other Catalan stations (Catalunya Informació, 7.6%; RAC1, 6.4%; COM Ràdio, 6.1%; Ona Catalana, 4.2% and Ràdio 4, 1.3%). Meanwhile, 17% of the people surveyed mentioned local broadcasters. From these figures we can see that 56.9% of listeners most frequently choose stations that originate in and broadcast to Catalonia exclusively in Catalan, while 40.4% opt for the big Spanish stations.

However, the analysis of the results in relation to the main sociodemographic variables indicates very important differences in the communicative practice. Place of birth is a big factor: while 35.7% of people born in Catalonia mentioned Catalunya Ràdio and nearly two-thirds (66.5%) said they most commonly listen to broadcasters with a Catalonia-wide scope that broadcast in Catalan, among

Quina cadena de ràdio escolta amb més freqüència? Distribució percentual per província

<i>Emissores</i>	<i>Barcelona</i>	<i>Girona</i>	<i>Lleida</i>	<i>Tarragona</i>
Catalunya Ràdio	30,1%	37,1%	40,4%	30,8%
SER	17,4%	14,1%	15%	18%
COPE	9%	5%	7,4%	6,4%
Onda Cero	8,7%	2,2%	9,5%	9,3%
RNE	6,7%	7,2%	7,3%	7,1%
Radio 4	1,3%	0,7%	1,8%	1,1%
RAC 1	6,4%	7,5%	2,9%	7,9%
COM Ràdio	7%	3,6%	2,9%	2,6%
Ona Catalana	4%	5,7%	4,8%	4,1%
Catalunya Informació	7,4%	9,4%	6,9%	9%
Ràdio Local	16,1%	19,4%	22,2%	19,8%
Una altra cadena	17,7%	24,5%	15,8%	25,5%
No sap	5,7%	1,1%	2,9%	3,8%
No respon	0,7%	2,1%	5,1%	1,5%

Font: Consell de l'Audiovisual de Catalunya

I quina cadena prefereix escoltar? Distribució percentual per província

<i>Emissores</i>	<i>Barcelona</i>	<i>Girona</i>	<i>Lleida</i>	<i>Tarragona</i>
Catalunya Ràdio	21,1%	24,1%	24,8%	19,9%
SER	12%	9,4%	7,7%	10,1%
COPE	3,3%	1,4%	2,2%	1,9%
Onda Cero	5%	0,7%	4,7%	3,4%
RNE	3,7%	4,7%	2,2%	3,7%
Radio 4	-	0,4%	0,4%	0,8%
RAC 1	3,3%	3,6%	1,1%	2,6%
COM Ràdio	3%	1,1%	1,1%	0,4%
Ona Catalana	1%	2,9%	0,7%	0,8%
Catalunya Informació	3,3%	2,9%	2,9%	2,6%
Ràdio Local	12%	13,6%	17,1%	14,2%
Una altra cadena	13,4%	21,2%	17,3%	16,9%
No sap	9%	7,9%	5,1%	12,7%
No respon	9,7%	6,1%	12,8%	10,1%

Font: Consell de l'Audiovisual de Catalunya

people born in the rest of Spain, SER, at 27.4%, beats Catalunya Ràdio (19.4%), while the big four Spanish stations together capture 72.5% of the most-frequently-listened-to stations.

Similarly, the variable of language regularly spoken indicates radically different habits. 48.7% of Catalan-speaking listeners mentioned Catalunya Ràdio as the broadcaster they most frequently listen to with no other station reaching 10% (RAC1, 9.3%; COM Ràdio, 8.8%; SER, 8.4% and Ona Catalana, 7.6%), so that the total of people mentioning stations that broadcast across Catalonia came in at 83%. On the other hand, Spanish-speaking listeners did not show such a marked preference for any particular station, beyond the indisputable leadership of SER (28.4%): 12.5% Catalunya Ràdio; 12.3% RNE; 11.4% Onda Cero; 10.9% COPE, with the other stations that broadcast in Catalan much further behind. In total, 63% mentioned Spanish stations (although a quarter indicated *other stations* as the station they listened to most frequently). It should also be mentioned that among the people who speak both languages equally the result was halfway between the other two segments: Catalunya Ràdio and SER tied for first place, followed by other Spanish and Catalan stations with little difference among them.

To complete this survey on the radio stations most frequently listened to, listeners (not all the interviewees) were asked which station they preferred to listen to. This question makes the analysis richer, even though the overall results did not change substantially: Catalunya Ràdio was the preferred choice of 21.4% of listeners, followed by SER (11.4%) and, much further behind, Onda Cero (4.5%), RNE (3.7%), Catalunya Informació and RAC1 (3.2%), COPE (3%), COM Ràdio (2.5%), Ona Catalana (1.1%) and Ràdio 4 (0.1%). All up, 31.5% of listeners preferred stations that broadcast across Catalonia and in Catalan, while 22.6% chose Spanish stations, 12.6% chose local stations and 14.6% chose *other stations*.

Preferences also indicated a very different result according to the variables *place of birth* and *language regularly spoken*. With regard to place of birth, Catalunya Ràdio was preferred by 24% of listeners born in Catalonia, three times the number who prefer SER (8.1%), while the other stations had figures of under 4%, meaning that more than one-third of the people (36.9%) mentioned stations that broadcast in

Catalan. 15.9% said Spanish stations, 13% said local stations and 14.2% said *other stations*. Among the people born in the rest of Spain, SER was mentioned by 20.5%, followed by Catalunya Ràdio (14%), while the other Spanish stations registered 6-7%. Of the other stations that broadcast in Catalan, only Catalunya Informació (1.4%) and RAC1 (1.2%) exceeded 1%. Aggregate figures indicate that 41.1% of people preferred Spanish-language stations, 16.9% preferred ones that broadcast in Catalan, 11% chose local broadcasters and 14.6% chose *other stations*.

With regard to language regularly spoken, the survey results clearly reinforced the leadership of Catalunya Ràdio among Catalan speakers (34.6%), way ahead of the rest: 4.7% chose Onda Cero, followed by RAC1 (4.5%), Catalunya Informació (3.5%), Com Ràdio (3.4%) and SER (3.1%). All up, 48.1% preferred Catalan stations that broadcast in Catalan, while 10.6% chose Spanish stations and slightly over 10% chose local and other stations. Among Spanish-speaking listeners, SER's leadership was also clear with regard to preferences (22%), more than trebling the result of Catalunya Ràdio (6.4%), RNE (6.3%) and the other Spanish stations, while the most-frequently mentioned Catalan stations were again Catalunya Informació and RAC1, registering 1.6% of preferences. All up, 36.5% chose Spanish stations, 10.5% chose Catalan stations, 14.2% chose local stations and *other stations* obtained a significant 20.8% of preferences.

Audiences and Preference By Other Variables

With regard to level of education, Catalunya Ràdio was mentioned more often as the preferred station in line with rising levels of education and obtained its best result among listeners with tertiary studies, both in terms of the question of the *station most frequently listened to* (34.4% of the 31.3% total listeners) and the *most preferred station* (29% of the 21.4% of total listeners). COM Ràdio also obtained its best result in this group (9.8% of people with tertiary studies said it was the station they listened to most frequently and 5.2% said it was their preferred station), with an enormous difference with respect to the other educational levels. Catalunya Informació and RAC1 obtained their best results among listeners with secondary and tertiary studies and the

figures for SER and COPE also rose (although not by much) in line with level of education. At the other end of the scale were the Spanish stations Onda Cero and RNE, which were listened to by fewer people in line with a rise in educational level.

In terms of sex, the stations with the greatest imbalance in favour of men were Catalunya Ràdio (39% of men said it was the station they listened to most frequently compared with 24.6% of women), SER (21.8% and 12.9%, respectively) and, in particular, RAC1 (9.2% and 4%), followed by Catalunya Informació and Com Ràdio. At the other end of the scale were Onda Cero and other stations, with more female listeners (25% of women compared to 11.8% of men). However, the question about preferences saw these results change somewhat, even though there continued to be a noticeable difference in Catalunya Ràdio (26.9% men compared to 16.6% women), SER (13.3% and 9.8%), COPE and RAC1, and a different profile was found for COM Ràdio (1.8% men compared to 3.2% women) and RNE (2% men compared to 5.2% women).

With regard to age, the distance between Catalunya Ràdio and the other stations as the most-frequently-listened-to station rose progressively up to the age of 64. Among young people and people up to 35, the differences with SER did not exceed 5% (21.6% Catalunya Ràdio compared to 17% SER among young people), while after the age of 25 the distance grew spectacularly, as, while SER always garnered less than 20% of responses, Catalunya Ràdio almost doubled its competitor in the segment of 35-49 year olds (32.6% compared to 17.4%), and trebled it in the 50-64 age group (45.2% Catalunya Ràdio versus 14.6% SER). It is in this segment that Catalunya Ràdio achieved its best result, as 35.9% of listeners over 64 mentioned it, compared to 19.2% who mentioned SER.

Among the Spanish stations, aside from the stable position SER obtained in all age groups, there was a rise in ratings among the other three stations in line with age, particularly in COPE and RNE. This is a phenomenon that was not perceived in the Catalan stations, which had results that make it impossible to establish clear trends, except for the previously mentioned case of Catalunya Ràdio.

It is also important to mention that according to this survey younger audiences do not listen as often to full-service stations, as 32.8% of adolescents and 30.3% of young

people said they frequently listened to *other stations*, a figure that fell noticeably in line with age.

In relation to preferences according to age, the profiles mentioned were practically the same. Firstly, up to the age of 35, *other stations* were the most popular option (ahead of the 22% in all cases), while Catalunya Ràdio and SER registered nearly 30% of preferences among listeners aged 18 to 49. The rise in preference for Catalunya Ràdio in the segment of 50-64 year olds (35.4% compared to only 8.9% for SER) makes it the most popular station for this age group, with the figure falling to 21% after this age and SER recovering to reach 14.7%, which goes some way towards restoring the balance.

It is also significant that the age group with the most diverse preferences was 35-49, as this is the group that recorded the highest level of overall radio consumption. Also, and with the prudence that the low level of responses calls for, we could say that in this area the big Spanish stations (with the same distinctions as suggested for SER) obtain their best results as listener age increases. Among Catalan stations, we can see that RAC1 does the opposite, becoming more popular as the age of the audience falls, while people in the medium age groups are the backbone of COM Ràdio and Catalunya Ràdio.

Assessment of the Radio Stations

Another very important part of the CAC survey referred to the public's assessment of the radio supply with regard to political impartiality and the quality of the news, entertainment and sports programming. However, as the survey involved questions put to all the interviewees rather than actual listeners, the analysis of the results includes the dead weight of the nearly 60% of interviewees who answered *don't know/no response* in some cases. Even still, the analysis makes it possible to establish a number of interesting ideas.

With regard to the station considered most politically impartial, an overwhelming and significant 60% answered *don't know/no response*, which climbed to 90% among adolescents and nearly 70% in the segments of young people and women. At the same time, a significant part of the population considered that none was (11.8%), which in

the case of the 35-49 year olds rose to 15.7% and, among people with a tertiary education, 17.8%. The most highly regarded station in this field was Catalunya Ràdio, with 8.4% of results, way ahead of the next (SER, with 4.8%), while no other station reached 2%. In other words, the results were very different to the projections that could be made based on the preferences mentioned above.

There were also very revealing differences in this area according to a number of sociodemographic variables, particularly place of birth and language regularly spoken. Among people born in Catalonia, Catalunya Ràdio rose slightly (9.1%), as did RAC1 (from 1.9% to 2.6%) and COM Ràdio (from 1.6% to 2.2%) while all the Spanish stations fell (although SER only by a tenth of a percent); on the other hand, among people born in the rest of Spain, Catalunya Ràdio fell to 6.5% and all the Spanish stations except COPE rose. Based on language regularly spoken, there was a similar phenomenon: Catalunya Ràdio rose among Catalan speakers (13.3%), as did RAC1 (3%) and the other Catalan stations to a lesser extent, while most of the Spanish stations fell. Similarly, Catalunya Ràdio fell among Spanish speakers to 3.3% of interviewees, as did the other Catalan stations, while all the Spanish stations rose, except for COPE. And, as in the questions mentioned above, the people who spoke both languages equally were somewhere in the middle, where the two leading stations (Catalunya Ràdio and SER) came in practically equal, and where COPE and Onda Cero achieved quite important results (more than 2%).

In relation to level of education, Catalunya Ràdio obtained the best result among people with secondary studies (11.2%), while SER was considered the most impartial in line with a rise in level of education and drew at 7.3% of mentions along with Catalunya Ràdio among people with tertiary studies. The volume of responses and distribution by groups according to this variable did not make it possible to extract reliable conclusions for the other stations. It is also impossible to make a valid analysis of the 'sex' variable because the percentage of women who did not respond was much higher than that of men. By ages, and only very approximately for the same reasons, it could be said that older people are more inclined to consider Catalunya Ràdio the most impartial, while SER had similar results for people aged up to 50, after which its figures fell.

With respect to which station provides the best news coverage, the number of people who answered *don't know/no response* fell to 45.6%, with a predominance of adolescents (75.7%) and young people (54.1%), Spanish speakers (53.5%) and women (52.8%). Once again, Catalunya Ràdio (18.5%) and SER (8.4%), in this case together with Catalunya Informació (7.9%), were the most highly regarded stations, coming in way ahead of the rest. But while the other Spanish stations received mentions of around 3%, none of the Catalan stations exceeded 1% of responses.

Once again there were very significant differences according to place of birth and language regularly spoken in classifying the station that provided the best news coverage. Among people born in Catalonia, Catalunya Ràdio scored 22.1%, followed by Catalunya Informació (10.1%) and SER (5.8%), a long way ahead of the other Spanish stations and even further ahead of the other Catalan ones. Among people born in other parts of Spain, SER scored highest (16.5%), followed by RNE (9.4%), Catalunya Ràdio (9%) and Onda Cero (7.8%), leaving the other stations with insignificant figures. An analysis according to language regularly spoken is even more remarkable: 31.3% of Catalan speakers chose Catalunya Ràdio while its rival SER only scored 4.6%, with Catalunya Informació coming in-between (11%). Among Spanish speakers, the preferences were more evenly shared, this time with SER coming in first (12.9%) followed by RNE (6%) and the other Spanish stations, and Catalunya Ràdio and Catalunya Informació scoring around 4%. Finally, among people who speak both languages equally, Catalunya Ràdio (13.3%) scored higher than SER (8.6%), Catalunya Informació (7.3%) and Onda Cero (7.1%).

With regard to the other variables, there were no significant differences with respect to consideration of political impartiality. Catalunya Ràdio came first in all age ranges and increased its lead over SER particularly after the age of 35, while SER dropped in consideration after the age of 50 and came second for the over-35 year olds, with figures ranging from 8 to 11%. Catalunya Informació came second in the groups aged 18-34 (around 12%). With regard to sex and level of education there were no significant differences with regard to the perception of impartiality or preferences.

With regard to station preferences in terms of entertainment, one-third of the interviewees did not express a preference, while 23.7% responded *other stations*. This figure, which could be expected as the survey did not count music stations and other types of stations that exist in the country, was particularly high among adolescents (30.1%), young people (43.3%) and people aged 25-34 (33.5%), as well as people with secondary studies (30.7%) and Spanish speakers (29.4%). Catalunya Ràdio was again the preferred station, but with a figure of only 12.1%, compared to SER's 7%. Local radio stations and RAC1 came next with more than 3% of responses. In this area there were again differences with regard to particular sociodemographic variables. It is interesting to highlight some information based on the language regularly spoken: among Catalan speakers Catalunya Ràdio scored 20.6% of preferences for entertainment value, but only 2.8% among Spanish speakers and 5.1% among people who use the two languages equally. The impact of other stations and the recovery of SER may explain this result, as the other stations received a very low response, except for RAC1 among Catalan speakers (3.8%, ahead of SER, with 2.4%, and Onda Cero with 2.9%) and RNE among Spanish speakers (4.7%).

With regard to best sports programming, 64.5% of the interviewees answered *don't know/no response*, meaning that the differences between the stations were very strongly affected in a percentage-based analysis and should not be considered to be extremely reliable. However, this was the area where Catalunya Ràdio's lead was less clear, scoring 10.9% compared to SER's 8.8%. Among the other stations, only COPE (2.5%) scored more than 1%. As with the other questions, place of birth was a variable that upset the result between the two most popular stations: 12.5% of people born in Catalonia preferred Catalunya Ràdio and 7.1% chose SER for sports programming, while among Spanish speakers SER was chosen by 13.5% and Catalunya Ràdio by 6.5% of the interviewees. The difference was even clearer with regard to language regularly spoken: 18.9% of Catalan speakers chose Catalunya Ràdio while only 4.3% chose SER, while among Spanish speakers SER scored 14.1% and COPE 2.4%, with Catalunya Ràdio reduced to third place with 2.3%. In this area, unlike the others, people who speak both languages equally preferred SER (10.5%) and COPE (6.4%) over Catalunya Ràdio (5.3%).

In the assessment of overall programming, with 45% of interviewees not responding, Catalunya Ràdio scored highest (16.1%), double the figure of SER (8.1%) and way ahead of the other Spanish stations (3.1% for RNE and Onda Cero and 1.8% for COPE). The second-highest-rating Catalan station was RAC1 (with 2.6%). The positive assessment of Catalunya Ràdio increased in line with age and level of education, unlike the other stations, which had a tendency that could not be established with the volume of results of the survey. Place of birth and particularly language spoken were again important factors in the results.

Music Stations

The survey devoted only one question to music stations but the results make it possible to draw a number of conclusions. The results largely coincided with the rating figures provided by the EGM, but with a number of slight differences probably due to the question asked (*which radio station do you prefer in terms of music programming?*). 40 Principales scored highest (10.3%), followed by Catalunya Música (5.9%), Flaix FM (5.7%), Cadena Dial (5%), Flaixbac (3.9%) and Radio Tele Taxi (2.7%). EGM figures put Catalunya Música much further behind.

By age, and as can be expected given the content, the younger groups concentrated their preferences on most of the stations except Radio Tele Taxi and Catalunya Música, which obtained better results in the older age groups. There were no significant differences in terms of sex, but there were some differences with regard level of education: while 40 Principales and Flaixbac had a heterogenous audience, Flaix FM was most popular with people with secondary studies, Catalunya Música with people with tertiary studies, and Radio Tele Taxi and Cadena Dial were particularly popular with people with primary and secondary studies.

Place of birth was also important with regard to music stations. Among people born in Catalonia, 40 Principales scored most (11.7%), ahead of Flaix FM (6.7%), Catalunya Música (6.6%) and Flaixbac (5.2%), while people born in the rest of Spain preferred Cadena Dial (9.6%) and Radio Tele Taxi (6.3%) over 40 Principales (5.8%) and the Catalan stations. The same could be said according to language regularly spoken: except for Catalunya Música (which

10.4% of the interviewees said had the best programming), among Catalan speakers there was a fairly equal division between 40 Principales and Flaixbac (6.1%), Flaix FM (4.7%) and RAC105 (3.7%), while Spanish speakers opted mainly for 40 Principales (15.9%), Cadena Dial (7.7%), Flaix FM (6.9%) and Radio Tele Taxi (4.7%). Once again, people who speak both languages equally came somewhere in the middle, with only 0.6% considering that Catalunya Música has the best programming.

Conclusions

Radio has a significant presence in the media habits of the Catalan people, as shown by the fact that only one-quarter of the population said they never listen to it and given the few differences based on the main sociodemographic variables.

Catalunya Ràdio is by far and away the leading station in the country. It is the station most often listened to, the favourite station of the most people and the one that the interviewees said provides the best news coverage, the best entertainment and the best overall programming. Only SER comes close, and in fact beats Catalunya Ràdio in terms of sports programming. The other Spanish stations have a very low presence among the population, and among the other Catalan stations the only ones that have been able to make a mark are RAC1 and, to a lesser extent, COM Ràdio.

There are two key factors in understanding the radio habits of the people of Catalonia: the language they speak and, less markedly, the place where they were born (i.e., Catalonia or other parts of Spain). These were the two variables that provided the greatest differences in the public's preferences and considerations about the impartiality and quality of the programming.

Notes

1. These figures can be consulted, for the whole of Spain, on the Media Research Association (AIMC) website:
http://www.aimc.es/aimc.php?izq=egm.swf&pag_html=si&op=cuatro&dch=02egm/24.html.
2. *CAC Survey 2003*:
www.audiovisualcat.net/recerca/enquesta2.pdf

The International Convention on Cultural Diversity (UNESCO). Context, Evolution and Perspectives

Martí Petit

- *In recent years, the world's consumption of cultural goods and services has grown significantly, spurred on by the digital evolution and the consolidation of the information society. At the same time, deregulatory policies have been applied to both international and domestic markets which have promoted unprecedented processes of economic and territorial concentration. This situation, which threatens the manifestation of cultural diversity and exchange, has set alarm bells ringing and multilateral organisations such as UNESCO, the European Parliament and even the G8 have responded by promoting cultural diversity on their agendas. UNESCO approved the Universal Declaration on Cultural Diversity in 2003 and launched a preliminary project in the form of a convention on cultural diversity. This was an international instrument that was to be binding in nature and with the legal force to ensure cultural diversity in the new context of digital globalisation. At the end of this article, I have included a chronological list of legal instruments in force in relation to cultural diversity*

The Growth and Concentration of the Cultural Industry

Because of the multiplication of trade exchanges that contribute to bringing down production costs, globalisation can have positive effects on intercultural dialogue. Cultural products have become an importance source of the creation of wealth and jobs. On the other hand, opening up markets leads the way to prospects, at least theoretically, with regard to creators in local cultural industries. Finally, progress in ITCs (information and communication technologies) is one way to participate in the social, cultural and economic life of cultures and languages.

Domestic and international markets have seen the rise of commercial operators that become oligopolies acting from a dominant position. These business conglomerates make the most of the synergies of technological convergence and the processes of business concentration in the sector. Their dynamics thus threaten to marginalise cultural diversity as well as independent cultural creators, producers and disseminators who work outside of the established official circuits.

In fact, arguments that hold that globalisation is an instrument for eradicating poverty appear to be unaware of the reality. The text entitled *Human Development Report 2003*¹, released by the UNDP (United Nations for Development Program), found that one-quarter of the world's population is not benefiting from the new model of economic growth based on the expansion of international trade and the development of new technologies. In absolute figures, the number of people excluded from *digital globalisation* stands at 1,200 million, who live in extreme poverty with an income of under a dollar per person per day.

A result of this exclusion is the abyss that has appeared between the production of cultural goods and services in

Quaderns Article

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wealthy countries and in the developing ones. In most developing countries, the production of cultural content (and, even more, its exportation) is particularly thin on the ground. This leads to major imbalances in the cultural sector's trade account in favour of a minority of rich countries.

The *Study on International Flows of Cultural Goods*, published by UNESCO, found that the value of the world's trade in cultural goods and service rose from \$US95.34 million in 1980 to \$US387.93 million in 1998. In other words, in nearly two decades the economic worth of cultural exchanges in the world rose by 400%. Most of this trade, which includes printed material, music, visual arts, film, photography, radio, television, videogames and sports merchandising, took place in a small group of countries. In 1990, Japan, the US, Germany and the UK were the leading exporters in the sector, with 55.4% of total volume. Throughout the 1990s, this accumulation of percentages fell slightly. However, there was one big change: by the end of the decade, a new player, i.e., China, had emerged to become the third-biggest exporter of cultural products.

Despite problems in statistical comparability between the parameters of each country, figures suggest that the global trade in cultural services is growing much faster than exports of traditional merchandise². Generally speaking, the expansion in the trade of cultural services is due to a rise in demand. For example, in 1995 French households spent an average of 3.5% of their annual budgets on cultural products. The so-called 'digital revolution', with the appearance of marketing behind it, has led to a rise in demand for cultural content, particularly audiovisual goods. In the final years of the 20th century, something occurred that fed this rise: the information society. Leisure consumption patterns changed both in rich countries and developing ones.

In the past 10 years, the structure of cultural industries around the world has changed profoundly, thanks in part to new digital technologies and the application of deregulatory policies at the national, regional and international levels. These factors have profoundly transformed the context in which the trade exchanges of cultural goods and services are carried out. The process of the internationalisation of sector companies, together with progressive concentration, has fostered the creation of a reduced number of big business conglomerates. Economies of scale and vertical

integration (which links the production of a good, such as a film, with its distribution, marketing of the soundtrack, marketing of the film, theme parks, websites and the online trade it generates) have brought an even greater hegemony to the US. This has set alarm bells ringing about the rise of a new world oligopoly, with some analysts comparing it to the car sector at the beginning of the 20th century.

According to figures published in *The Economist*³, 36% of sector companies in 1993 were headquartered in the US, 36% in the EU and 26% in Japan. Just four years later, in 1997, more than half the companies were headquartered in America. In fact, even though there are other big audio-visual-content producers (India makes seven times more films than the US), Hollywood is the major exporter. In 1980, the US obtained 30% of its profits from exports, while by the end of the 1990s this figure had grown to 50%. Meanwhile, the trade deficit in the audiovisual sphere in Europe rose from \$US3.5 million in 1993 to \$US6 million in 1998. Even further behind it was Africa, which at the end of the 1990s produced an average of just 42 films per year.

As this information suggests, the cultural industry is growing and concentrating. Given that trend, what does the future hold for cultural diversity at the international level? Will markets alone be able to guarantee the survival of a (minimum) level of cultural, linguistic and symbolic diversity in the new digital context?

Cultural Diversity and International Trade

The first big discussion (and the first big diplomatic battle) about the need to regulate the cultural sector at the international level took place within GATT (the General Agreement on Tariffs and Trade). The idea of regulating cultural trade was debated at the round of negotiations that began in Uruguay in 1986 and which in 1993 led to the establishment of the World Trade Organisation (WTO). Some countries, led by France and the European Commission, argued that cultural and audiovisual activities transmitted a society's fundamental values and as such, were of essential importance to questions of social identity and development and should not be subject to the same treatment as regular goods. This argument quickly came to be known in the media as "the cultural exception". Culture

would be excluded from international free-trade agreements and could be subject to protection and State aid.

The opposing side of the argument was taken up by the US, which defended that cultural goods and services (with audiovisual goods at the forefront) should be considered entertainment products and thus be subject to established trade regulations like any other product. Everybody was aware that, beyond the short-term trade interests of the two sides, there was a radically ideological confrontation. Pascal Lamy, the EC Trade Commissioner responsible for negotiations on the part of the 15 EU members before the WTO, said in his book *L'Europe en première ligne*: "The method the Americans recommend is the opposite of ours: they want to 'frame' the notion of cultural diversity so that it does not hinder market development. We want to 'frame the market' on the basis of common values and precepts so that market development becomes respect for cultural diversity."⁴

Before the new round of negotiations began in Doha (Qatar) in November 2001 (which is still open), the US set out its position in an official communication to the WTO on 18 December 2000. In this statement, the US government considered that the audiovisual sector had changed significantly since the Uruguay Round ended in 1993-94. During this period, negotiations had centred on film production and distribution and terrestrial broadcasting. The new digital technologies, the statement explained, had provided the opportunity to access consumers from around the world and stimulated the development of audiovisual goods and services from across the planet. On the other hand, technical innovations such as digital compression were bringing down production and transmission costs, while broadband was opening the door to content distribution at a much cheaper cost. Finally, the audiovisual sector had been a driving force behind the development of telecommunications networks. The rise in demand for audiovisual goods and services had thus encouraged investment in infrastructures.

However, the US statement to the WTO contained some concessions, for the first time, on State intervention in cultural policies. It recognised that Member States could consider aid to satisfy each country's need to promote its cultural identity, in an environment favourable to the maintenance of local culture. With this aim, it said, many Member States subsidised theatrical film production. The

statement concluded by saying there was a precedent in the WTO to create regulations that recognised the application of subsidies carefully circumscribed to specifically defined goals, so long as the potential effects of market distortion were minimal or neutralised.

This conclusion is partially correct, as State intervention in the sector can change spontaneous market behaviour, but there are other factors that also provoke distortions:

- High levels of business concentration that form *global oligopolies*
- Different access to economies of scale for reasons of business size, size of the population or language
- The lack of ability on the part of developing countries to promote their creative talent
- The ability of the big US companies to sell distribution rights for audiovisual content at greatly reduced prices once they have written off production costs on the domestic market

These and other dynamics peculiar to cultural markets require regulatory, institutional and financial measures to ensure the availability of different domestic and foreign content.

On the other hand, it is generally agreed that one objective difficulty in applying international agreements is precisely the lack of a uniform criterion for their interpretation. Not only are there differences in economic interests, the parties also disagree on values and cultural structures, making it possible to draw very diverse evaluations from the same facts. Furthermore, many bilateral agreements between States very often contradict the principles established by the WTO, e.g., non-discrimination with third countries. That is why it is crucial to agree on a better understanding of the issue, particularly for developing countries. Each State and community must identify areas of strategic interest for their respective cultural sectors. To this end, multilateral cooperation has to play a fundamental role.

Multilateral Declarations and Commitments In Favour of Cultural Diversity

Since the end of the 1990s, a strategy has been developed by multilateral countries and organisations aimed at defen-

ding and promoting cultural diversity at the international level. The Intergovernmental Conference on Cultural Policies for Development, organised by UNESCO in Stockholm from 30 March -2 April 1998, established that sustainable development and cultural dynamism were intimately linked. Referring to article 27 of the Universal Declaration on Human Rights on the right to access and participation in cultural life, the UNESCO Member States approved a Plan of Action that concluded: "The purpose of cultural policies is to determine objectives, create structures and obtain adequate resources to create a favourable human environment"⁵.

The Council of Europe took the same position in a declaration adopted on 7 December 2000. In this agreement, the committee of ministers established that "cultural and audiovisual policies that respect and favour cultural diversity have to be considered as a necessary complement to trade policy. (...) The big cultural industries that encourage linguistic diversity and artistic expression, as a true reflection of diversity, have a positive impact on pluralism, creativity, competitiveness and jobs"⁶.

The G8 meeting that took place in Okinawa (Canada) in July 2000 declared in its final communication that the eight members (the US, Germany, Japan, France, Italy, the UK, Canada and Russia) held cultural diversity to be a priority on their agendas. They also recognised "the work of relevant international organisations, in particular UNESCO, in this field"⁷.

In fact, UNESCO has taken up the mantle in the promotion of cultural diversity. In November 2001, one week before the new round of WTO negotiations began in Doha, UNESCO approved the Universal Declaration on Cultural Diversity at its 31st General Conference⁸. In the words of its director-general, Japan's Koichiro Matsuura, UNESCO wanted this declaration to become as powerful a reference point "as the Universal Declaration on Human Rights". With this goal, both the declaration and the plan of action that went with it proposed creating an international instrument on cultural diversity.

A number of international forums have considered establishing an instrument of this type. One example is the International Organisation of the Francophonie (OIF), the institution founded by French-speaking countries and which currently has 51 members⁹. In its meeting in Beirut (Lebanon) in October 2002, the heads of states and governments

gave their full support to the project undertaken by UNESCO.

Another example is the International Network on Cultural Policy, which brings together the culture ministers of 62 countries, including Spain, France, the UK, Russia, Brazil and China¹⁰. At their meeting in Paris of 5-6 February 2003, the ministers agreed that UNESCO had the mandate in this field, as it was the seat of the international instrument on cultural diversity because of its responsibility for culture, in the same way that the WTO was responsible for trade. It thus identified UNESCO as the "appropriate institution for preparing and implementing" an agreement of this type, and said so to Koichiro Matsuura, who was present at the meeting¹¹.

Another example of these international positions is the *Report on the Preservation and Promotion of Cultural Diversity* presented by the European Parliament on 15 December 2003¹². In this document, the European Parliament "considers it essential to recognise, in the area of international legislation, cultural diversity through the negotiation and approval, in the short term, of an international convention on cultural diversity in the framework of UNESCO. [It also] considers that the International Convention [...] is appropriate for promoting cultural policies and ensuring at the international level the protection and promotion of the diversity of cultural content and artistic expression, which appear to be particularly threatened by globalisation."

The European Commission weighed in with a Communication to the Council and the European Parliament (27 August 2003)¹³ which concluded by saying that "the culture ministers meeting in Salonika have detected the need to safeguard and promote cultural diversity and that an international instrument from UNESCO could be the legally appropriate response at the international level. The Commission believes it is important that EU members state their unanimous commitment to cultural diversity at the international level. The Commission calls upon the EU to have an active function in the subsequent UNESCO General Conference, particularly in the preliminary discussions about the preparation of an international regulatory instrument on cultural diversity".

As we can see, the goal of this joint diplomatic strategy consists of creating an international instrument on cultural diversity that is binding in nature and with legal force.

UNESCO: International Convention on “The Protection of the Diversity of Cultural Content and Artistic Expressions”

At the initiative of countries such as Germany, Canada, France and Mexico, the 166th meeting of the UNESCO Executive Council, which took place on 18 July 2003, approved the *Preliminary Study on Technical and Legal Aspects Relating to the Appropriateness of Preparing a Regulatory Instrument on Cultural Diversity*¹⁴. On 17 December 2003, Koichiro Matsuura opened the first experts’ meeting on the preliminary project.

Firstly, the study recognised that international law still did not offer a clear definition of the content of cultural rights. Furthermore, the provisions relating to these rights were dispersed among different international instruments, something which undermined their consistency and global legibility. In general terms, it could be considered that cultural rights are the rights that protect “each person’s participation in cultural life and their access to it”; the freedom of creative activity and scientific research, the right to education and the right to access artistic expressions and scientific and technological know-how. This approach made it possible to establish a relationship between cultural diversity and the universal principles of human rights and democracy.

All up, the idea the study highlighted was the need for the new instrument to be legal in nature, in line with the Declaration on Cultural Diversity. The Declaration, a non-binding text although with an undeniable moral authority, invited participants to adopt an international agreement - a more ambitious and, in principle, more effective instrument. The sphere of application was a reference point to bear in mind, as it would no longer be a declarative document but a binding instrument that would establish a set of rules that the greatest number of States possible should assume and voluntarily enact.

The two questions that should be taken into account in the agreement would be authors’ rights and the need to recognise the singular nature of cultural goods and services as transmitters of identity, values and meaning. With regards authors’ rights, UNESCO had already enacted two conventions in this area: the 1952 Universal Convention on Authors’ Rights, revised in 1971¹⁵, and the Rome Conven-

tion for the Protection of Performers, Producers of Phonograms and Broadcasting Organisations¹⁶. However, the sphere of application of the two conventions was updated with the approval of the Trade Related Aspects on Intellectual Property Rights (TRIPS) at the WTO¹⁷.

The sphere of application of the new agreement would have to therefore be the singularity of cultural goods and services in international trade. There are two regulatory binding instruments from UNESCO, the 1950 Florence Agreement¹⁸ and the 1976 Nairobi Protocol¹⁹ that deal with the importation of educational, scientific and cultural materials, and thus promote the free movement of books, newspapers, magazines, documents, works of art, films and sound recordings, and scientific instruments aimed at teaching and the blind. However, this agreement established a clause by which each signatory state could “totally or partially suspend the contracted agreements if imports into its territory [of cultural goods] lead to a relative rise that constitutes or could constitute serious prejudice to domestic producers of similar products or ones in direct competition.”

The 1976 approval of the Nairobi Protocol updated the Florence Agreement. Taking developing countries’ needs into account, the text extended the agreement’s sphere of application and eliminated a string of discriminations. However, the economic, technological and political context in which they were approved was very different. That is why the best option would be to approve a second protocol of the Florence Agreement that would include the social and cultural needs of the information society. These can be summarised in six major headings:

1. The promotion of linguistic diversity in cultural industries
2. The condition and situation of the artist
3. The movement of people, goods, services and know-how related to cultural activity
4. Culture as an element of development
5. Dialogue between cultures and international cultural cooperation
6. Cultural policies

The convention would thus provide an international framework for governments to define the policies needed to promote the production and availability of local content for their own citizens. The final aim of this instrument on cultural

diversity is in fact guaranteeing access to different cultural goods and services, both domestic and foreign. This does not involve restricting the international trade of these products or legitimising protectionist measures. On the contrary, it is based on the principle of balance between the right to promote local creation and its access on the one hand and the duty to be open to cultural content from other countries on the other. The agreement is born from the need to promote cultural cooperation as a way to disseminate cultural diversity.

Final Considerations

As the annex to this article shows, there is a very long list of international instruments relating to culture, diversity and intercultural dialogue. However, the vast majority are only statements or, when they involve an agreement between States, do not include an arbitration and/or disciplinary mechanism for breaches of agreement. The few exceptions are the WTO agreements, which consider culture as an indistinct good. On the other hand, the problem of cultural diversity in a process of economic globalisation is relatively new and so there are few instruments that include this perspective. In this framework, and as Ivan Barnier²⁰ says, we can find some major shortfalls that the UNESCO instrument should take into account:

- **Lack of a comprehensive vision of the effects of globalisation on cultural diversity.** The most serious deficiency stems from the fact that the existing instruments establish a partial approach to the problem. There are perspectives related to human rights, intellectual-property rights, the protection of heritage, cultural policies, linguistic rights, cultural pluralism, cultural development, international cultural cooperation, etc. What is missing is in fact an international legal instrument that covers all these perspectives and monitors what is known as *cultural biodiversity*.

- **The weakness of the cultural perspective compared to the trade perspective.** In the rounds of negotiation about international trade deregulation, the process is followed by trade experts but not by experts in culture. This is logical, but at the end of the day it undermines the strategy that defends culture as a specific good. As a tactical proposal, it

raises the need to project the slogan “Culture Is Not Just Any Old Good” in society.

- **Imbalance in cultural exchanges.** This imbalance, particularly noticeable in the audiovisual field, arises not just in developing countries but also in the majority of developed ones. We thus find a minority of countries that produce and export cultural products flooding the markets of developing and developed countries alike. Cultural diversity is thus suffering not just in terms of own national expression but also in terms of know-how and dialogue with other, non-exporting, cultures. In fact, this trade imbalance establishes a common standard of international culture, i.e., Hollywood.

- **Not enough attention paid to local requirements.** Cultural diversity is based on international, national and *local* spheres. Diversity is not the monopoly of multilateral institutions and nation states, but rather local communities have their own important role in building public networks of participation and exchange.

This is the situation UNESCO is currently facing when it comes to preparing an instrument on cultural diversity. However, it is important to mention a final issue that will be key to it being a truly useful and effective initiative. To date, the defence of cultural diversity under international law has been, as I have already said, mainly based on releasing statements. Agreements of all types have failed to anticipate any effective control or disciplinary mechanism. This is the central point because, if we begin from an object that is hard to define legally, the efficacy of any initiative will be null and void. The international instrument on cultural diversity that UNESCO is preparing could become just another bureaucratic initiative without any effective applicability.

Notes

1. <http://www.undp.org/hdr2003/>
2. Statistical definitions are very disperse, even with the OECD. For example, in the OECD publication *Services Statistics on International Transactions 1970-1994*, the figures for Japan are grouped under the heading “film rentals”, while those of Germany fall under the heading “films and television”, in France they were “audiovisual programmes”, in Canada “films and broadcasting” and in Austria “culture and entertainment”. Furthermore, one of the main difficulties in interpreting figures on cultural services is the fact that many trans-border operations within a same multinational in a sector are not entered into the accounts.
3. *The Economist*. 21 November 1998.
4. LAMY, Pascal. *L'Europe en première ligne*, Paris, Seuil, 2002, p. 142.
5. www.unesco.org/culture/laws/stockholm/html_sp/actionpl1.shtml
6. <http://cm.coe.int/ta/decl/2000/2000dec2.htm>
7. <http://www.g8.utoronto.ca/summit/2000okinawa/finalcom.htm>
8. <http://unesdoc.unesco.org/images/0012/001271/127160m.pdf>
9. <http://www.francophonie.org/>
10. <http://206.191.7.19/>
11. The International Network on Cultural Policy includes Argentina, Armenia, Austria, the Bahamas, Barbados, Botswana, Brazil, Burkina Faso, Cameroon, Canada, China, Colombia, Croatia, Cuba, Finland, France, Georgia, Germany, Greece, Guyana, Haiti, Hungary, Iceland, Italy, Ivory Coast, Jamaica, Jordan, Latvia, Lebanon, Lesotho, Luxemburg, Malaysia, Mauritius, Mexico, Morocco, Mozambique, the Netherlands, New Zealand, Norway, the Philippines, Poland, Portugal, the Republic of Korea, Slovakia, Slovenia, Spain, the Central African Republic, Rumania, Russia, St. Lucia, Senegal, South Africa, Sweden, Switzerland, Trinidad and Tobago, Tunis, the Ukraine, the United Kingdom, Vietnam and Zimbabwe.
12. http://206.191.7.19/w-group/wg-cdg/news0206_s.shtml
13. <http://www2.europarl.eu.int/omk/sipade2?L=ES&OBJID=40464&LEVEL=3&MODE=SIP&NAV=X&LSTDOC=N>
14. http://europa.eu.int/eur-lex/es/com/cnc/2003/com2003_0520es01.pdf
15. <http://unesdoc.unesco.org/images/0013/001307/130798s.pdf>
16. http://www.unesco.org/culture/laws/copyright/html_sp/page1.shtml
17. <http://www.wipo.int/treaties/en/ip/rome/index.html>
18. http://www.wto.org/spanish/tratop_s/trips_s/trips_s.htm
19. http://www.unesco.org/culture/laws/florence/html_sp/page1.shtml
20. http://www.unesco.org/culture/laws/florence/html_sp/page4.shtml
21. http://206.191.7.19/w-group/wg-cdg/reader/questions_e.shtml

Annex:

Chronological list of instruments in force on cultural diversity, whether binding (charters, agreements, conventions, protocols and treaties) or non-binding (declarations, resolutions, recommendations, plans of action, principles and guidelines).

- League of Arab Nations, Arab Cultural Treaty, November 1946.
- European Cultural Agreement (ETS No. 018, 1954).
- UNESCO, Agreement on the Importation of Educational, Scientific and Cultural Materials (Florence Agreement, 1950) and updated Nairobi Protocol, 1976.
- Convention for the Promotion of Inter-American Cultural Relations, 1954.
- OECD, Code of Liberalisation of Current Invisible Operations, 1961. This code covered a range of services, including audiovisual services, which were the object of special regulations expressly authorising the establishment of broadcasting shares and subsidies for their protection.
- UNESCO, Declaration of the Principles of International Cultural Cooperation, 1966.
- U.N., International Covenant on Civil and Political Rights, Resolution 2200A (XXI) from the General Assembly, 16 December 1966. Article 27: Recognition of the Rights of Ethnic, Religious and Linguistic Minorities within the States.
- U.N., Declaration on the Principles of International Law Concerning Friendly Relations and Cooperation Among States in Line with the United Nations Charter, Resolution 2625 (XXV) of the General Assembly, 1970.
- General Recommendation from the Intergovernmental Conference on Cultural Policies in Europe, Helsinki, 1972.
- Declaration from the Intergovernmental Conference on Cultural Policies in Asia, Jogjakarta, 1973.
- Declaration from the Intergovernmental Conference on Cultural Policies in Africa, Accra, 1975.
- Organisation of African Unity, Cultural Charter for Africa, 1976.
- ASEAN, Declaration of Agreement of the Association of Southeast Asian Nations, 1976.
- UNESCO, Recommendation on the International Exchange of Cultural Goods, Nairobi, 1976.
- UNESCO, Recommendation Concerning the Participation and the Popular Masses Contribution to Cultural Life, Nairobi, 1976.
- Declaration of Bogota, Intergovernmental Conference on Cultural Policies in Latin America and the Caribbean, 1978.
- Final Declaration Adopted by the World Conference on Cultural Policies, Mexico City (1982).
- UNESCO - MONDIACULT, World Conference on Cultural Policies, Mexico, 1982.
- Council of Europe, Recommendation 1043 (1986) on Linguistic Heritage and European Literature.
- Council of Europe, Recommendation 1059 (1987) on the Economy of Culture, 1987.
- Council of Europe, Recommendation 1067 (1987) on the Cultural Dimension of Broadcasting in Europe.
- Organization of American States (OAS), Additional Protocol to the American Convention on Human Rights in the Area of Economic, Social and Cultural Rights (San Salvador Protocol), 1988.
- European Union, European Directive on Television Without Frontiers (ETS-132, 1989, in force as of 1993).
- UN, Declaration on the Rights of People Belonging to National or Ethnic, Religious or Linguistic Minorities,

Resolution 47/135 from the General Assembly, 18 December 1992.

- Council of Europe, Recommendation 1216 (1993) on European Cultural Cooperation.

- North American Free Trade Agreement (NAFTA), 1994. Agreement between the US, Canada and Mexico: Articles 2106 and Annex 2106 referring to the relative exemption of measures that affect cultural industries.

- GATT Agreement (1947), Article IV of 1994 on the special provisions relating to films.

- General Agreement on the Trade of Services (GATS, 1995). Articles II (Most Favoured Nation Treatment), XVI (Access to Markets) and XVII (National Treatment).

- Council of Europe, Recommendation 1265 (1995) on Enlargement and European Cultural Cooperation.

- Council of the European Union. Decision 96/664/EC of 21 November 1996 – Promotion of Linguistic Diversity in the Community in the Information Society.

- MERCOSUR, Cultural Integration Protocol, MERCOSUR /CM/Dec. Decision No. 11/96. By virtue of this instrument, signatory States agreed to promote cooperation and exchange among the respective cultural institutions and their representatives (article 1, paragraph 1).

- Council of Europe, European Charter of Regional or Minority Languages (1998); ETS 148.

- Council of Europe, Recommendation R (98) 6 of the Committee of Ministers to Member States related to Modern Languages.

- UNESCO, Intergovernmental Conference on Cultural Policies for Development, Stockholm, 1998.

- UN, Resolution Approved by the General Assembly 53/184. Cultural Development, 1998.

- International Organisation of the Francophonie (OIF): Final Declaration from the Moncton Summit (1999).

- Council of Europe: Declaration on Cultural Diversity (2000).

- European Parliament and Council of the European Union. Decision Declaring the European Year of Languages, 2001 (8 June 2000).

- European Union and the African, Caribbean and the Pacific Group of States (ACP). Cotonou Agreement (23 June 2000), Adapted in Replacement of the Lomé Convention.

- UN, Resolution Approved by the General Assembly 55/192. Culture and Development, 2000.

- Council of Europe: Declaration on Cultural Diversity 2000.

- International Organisation of the Francophonie, Third Ministerial Conference on Culture, Cotonou Declaration (2001).

- International Network of Cultural Policies, Cape Town Declaration, October 2002.

- UN, Report on the World Summit on Sustainable Development, Johannesburg, Plan of Application, chapter 1, Resolution 2, annex (September 2002).

- International Organisation of the Francophonie, Beirut Declaration (2002).

- UN, Resolution 57/249 Approved by the General Assembly. Culture and Development, 2002.

- Council of Europe, Resolution 1313 (2003), Cultural Cooperation Between Europe and the Southern Mediterranean Countries.

- Council of Europe, Recommendation R (2003) 9 from the Committee of Ministers to Member States concerning measures to promote the democratic and social contribution of digital broadcasting.

Ten Years of L'Alternativa, the Barcelona Independent Film Festival: the Aesthetics of Resistance

Fran Benavente

Opening

A colossal struggle surging from the depths of the grey stone. This is the representation of the dramatic battle that shows the resolution of the confrontation between the gods and the titans who rose against their divine power in the frieze of Pergamum. According to the characters in the novel by Peter Weiss¹, the materialisation of the mythic battle depicts the secular struggle of the resisters and the disadvantaged against the kings who attempt to keep control over their territory.

The world of cinema, like the world of art, also has its hierarchies. On one level are the people who control stories and leisure from the increasingly unreal Olympic mount of Hollywood and on another are the titans of *auteur cinema*, who, from their comfy position, are able to make films in harmony and balance without the gruesome material, violence and upheavals that really matter in films.

The Barcelona Independent Film Festival, also known as L'Alternativa, aims to showcase the rebels and the defeated, along with the images that inhabit the fissures in the most immediate reality. The Festival celebrated its 10th anniversary in November. By simply surviving, and by making a stand for alternative cinema, it has managed to attract an ever-growing audience, to the point that it has become the main film festival in town, indispensable in Catalonia and significant in Spain. The most recent Festival attracted over 30,000 people, featured 340 films and included the participation of 120 filmmakers.

The horizon was not so clear nor the prospects so good 10 years ago. As the name suggests, the Festival was established as a platform for alternative cinema. It aimed to shine a light on the films that had inhabited the underground movement, including experimental films, the most radical research works and the avant-garde of abstraction within contemporary art.

The Festival was established by the *Fàbrica de Cinema Alternatiu* (Alternative Film Factory), a young and particularly active group of people committed to cinema because they not only love film but also its moral, social and political implications. These young people, with a militant vocation in an untitled culture, were able to change a modest viewing platform on the margins of commercial channels into a true meeting point by and for researchers into the most innovative trends in the audiovisual industry.

Support from institutions such the Barcelona Centre for Contemporary Culture (CCCB), which provided spaces, infrastructures and materials, through to the Society of Authors and Editors (SGAE), the company AISGE (Artistes Intèrprets Societat de Gestió), Barcelona City Council and the Generalitat of Catalonia, ensured the Festival an ongoing and spectacular growth and generated a complete change of perspectives or repositioning. The third Festival, in 1996, was a precursor of what was going to happen. The CCCB was consolidated as the central space, with other spaces, including the Maldà Cinema, the French Institute, the Apolo Cinema, the FNAC del Triangle store, the SGAE and the Catalan Institute of Latin American Cooperation (ICCI), later progressively joining to form a network that included a good part of the cultural heart of the city. More importantly, the changes provided a window of opportunities in the selection and search for new perspectives that went beyond what was usually known as underground cinema.

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In 1997, a year after these decisive changes were made, the name was changed to include the term 'the Barcelona Independent Film Festival'. The name change announced a transformation in the event. The former selection by La Fàbrica became an official, competitive section structured around four categories: short films, animation, documentaries and feature films. There was also a proliferation of parallel sections, one of the Festival's strongest points. An exhibition of alternative films became the most important festival in town. An increasingly solid and better-defined structure was imposed onto the organisational miracle of the early days - a design which, with a number of variations, has now survived for 10 years.

Supporting Low Budget Cinema

A recent article by Jean-Louis Comolli in *Cahiers du Cinéma*² reopened the debate about the definition of a film model on the margins of the impositions of the industrial system. In Comolli's view, the major enemies of free cinema are money, television and show business, which turn it into a consumer good rather than a tool for discovering the world. Comolli's alternative proposal was based on low-budget films, calling for productions that involved little money, small teams and a desire to return to reality. He also insisted on rejecting the policy of entertainment and escapism imposed by television and leisure organisations.

This aesthetic programme, very much in keeping with the concept of 'third cinema' recovered by Vincent Dieutre, formed a good framework for the aims of L'Alternativa, as it opted for alternative productions with low budgets and a high degree of commitment to reality and focused on events, environments and discussions on the margins of the markedly informative agenda on television, giving a voice and face to people excluded from the concerns of the consumer society. Where television imposes a flow of events and oblivion is systematic, alternative film, such as that advocated by L'Alternativa, proposes a critical change in framework, a return to the real material under the reflexive prism and a recovery of memory. In short, it poses a precise establishment of time and a lingering gaze to tackle the diffuse temporariness and critical dissipation that has become widespread in the age of audiovisual production.

The Laboratory

Finding another gaze involves risk, expressive innovation and research into audiovisual languages. This is only possible with laboratories, i.e., research spaces isolated from economic conditioning factors and institutionalised discourses.

In the cinema, laboratories are found in the fields of short films, documentaries and animation. They have thus been the areas the Festival concentrates on, even above and beyond the regular selection of feature films.

Short films are unfortunately considered by most of the young people who hope to work as directors as a way of making money in the film industry. The result of this lack of ambition is to treat the format as a showcase for technical ability or narrative know-how, without any discourse or gaze to sustain it. L'Alternativa chose the opposite route, with the only *raison d'être* of the short as a strong, justifiable format and not a propaedeutic subsidiary of feature-length works. Short films are the minimum unit common to most alternative filmmakers' work – we have seen how the underground concept was part of the initial spirit of the Festival – and are also the ideal format for starting off as a filmmaker. The compression the format demands makes it necessary to exercise ideas, secure maximum expressiveness with a minimum of elements and dispense with the detours that feature films include. In this sense, one of the most interesting peculiarities of L'Alternativa was the extraordinary attention paid to works arising from film schools, generally short films. The Festival has been an incredible thermometer of the future of filmmaking and audiovisual works, getting them onto the screen and establishing a special section for the works of these potential filmmakers. This is a laboratory in its truest sense: a place to make mistakes, to test out and experiment with film elements.

Furthermore, if we add the constant presence of seminars, round-tables and diverse training courses in different aspects of filmmaking, which are an ongoing complement of a proteiform and ambitious festival, we find a proposal of didactic vocation for developing not just filmmakers but also intelligent audiences.

As well, while it is common in classic cinema to become a film director by rising through the professional ranks, from the levels of editing, producing or scriptwriting, modern

filmmaking establishes the short film as a test bank, a research place for a personal voice. It was thus considered essential to have a section entitled "The Unknown of the Known", which includes short works from European and Spanish filmmakers. The early short films of Eric Rohmer, Jean-Luc Godard, François Truffaut, Roman Polanski, Julio Medem, Juanma Bajo Ulloa, Gracia Querejeta, Daniel Calparsoro and many others have been shown at the Festival, allowing us to see how their early forays into the medium sowed the seeds of what would later become a very particular viewpoint. In other cases, the short format represented a moment of pause, a recreational and libertarian window onto cinema without prejudices, e.g., in the brief incursions of Aki Kaurismäki.

In the field of documentaries, particularly ones produced in recent years, the instability of material filmed from centres of privileged interest made it necessary to have a constant invention of form. The confrontation with reality called for research into film writing. The health of independent film includes the vitality of the documentary and the continual discovery of the new film devices it proposes, as well as the increasingly pronounced contamination of the borders between documentaries and fiction.

In this fertile landscape of the creative documentary, L'Alternativa has been a good showcase for the most innovative and interesting film experiments of recent times. It has included radical devices for reconsidering history through work about pre-existing images, archives or unearthed material, to produce a discourse where editing and its operations on the image activate a rewriting from which information emerges on what is likely to happen under the dominant appearance. This is the case of the work of the Hungarian filmmaker Peter Forgacs, who has many films to his name but who is practically unheard of and who shows how history can be considered through film. A documentary can also be an extreme experience in subjectivity, in the exploration of one's own body through a self-portrait, letter or filmed confession. In this case, the 'I' is the personal memory bank, the object and subject of the investigation, such as in the remarkable films of Stephen Dwoskin. A documentary can also be an instrument for observing a world in decline, the action of time and how film is the priority instrument for capturing it. Such is the case, for example, of Pablo Garcia's first work, *Fuente Álamo, la*

caricia del tiempo, (Alamo Fountain, The Caress of Time), which was shown at the Festival long before its discreet general release. A documentary can also be an extremely important political tool, an oblique view of reality from the position of a resister, such as the viewpoints taken in the latter stages of Francoism by Joaquim Jordà, Pere Portabella and Basilio Martín Patino; or a form of continual commitment and revival of historical memory, such as in the case of filmmakers like Llorenç Soler and Javier Corcuera, whose works have been featured in the interesting section entitled "Synergies of History".

With regard to animation, the leading figure could be said to be Canada's Norman McLaren, a creative genius at intersecting animation with music and contemporary art, territories often employed in the most interesting experiments in this field. His work was recognised in a retrospective in 2002, a just tribute to the articulator of an entire abstract universe, who explores the road of the many audacities that contemporary animation proposes in the purely formal sphere that connects very directly with the main seams of alternative cinema, the main sector in which the Festival began.

However, as L'Alternativa demonstrates each year, animation is not just a space for investigating the format peculiar to abstraction but opens the door to an infinity of techniques, from traditional animation through to painting on stills, plasticine models and the use of new, synthetic image technologies. It also proposes many possible discourses: from narrative concentration in the style of a short story to the creation of imaginary universes or nightmares (e.g., the outstanding work of the Quay brothers), from humour, e.g., Nick Park and the Aardman studies, to the ironic commentary of Juan Padrón and the Cuban animators.

The Margins

Intellectual transgression as a programme, the desire to experiment and the choice of the most radical options to guard against asphyxia in creation have forced the Festival to seek its space on the margins of official film centrality. This search for new sensibilities with regard to reality and a critical commitment to the environment are reflected in the option of discovering new audiovisual frontiers both with

regard to geography and aesthetics. the dominant ideological discourse, i.e., the ethnocentric view of the world. In line with new multicultural ideas, but also with a remarkable intuition of what would really happen in cinema, L'Alternativa sought different cultural codes, different models, i.e., different points of view, in foreign films.

The most recent Festival included excellent examples in three areas: firstly, the general view of young Iranian cinema made it possible to see how the ongoing rediscovery of the world in the films of Abbas Kiarostami, Moshen Makhmalbaf and Jafar Panahi has continuity with the new generations, who have a view on the margin of institutional codes that seeks a new film experience. Secondly, retrospectives of the works of Mario Handler and Manane Rodríguez brought us closer to the reality of South America in its social facets and historical reflection. Handler uses documentaries to explore spaces of marginality, poverty and social indifference, and particularly to explore faces, i.e., passionate bodies that he provides with words and images of what is private. Rodríguez uses fiction to reclaim the fundamental tasks of memory, analysis and exorcism, the denunciation of a history marked by dictatorial terror.

Finally, the official feature-films section also paid special attention to little-known film industries, such as the ones of Eastern Europe, which at one point were the emerging centre of European filmmaking and which now, after years of uncertainty, show signs of a revival. Two young Hungarian filmmakers were the protagonists of the most recent Festival. György Pálfi, who won the award for best feature film, presented *Hukkle* (2002), a look at the pace of a rural world that unearths a bitter violence hidden under the apparently quotidian life. The film changes from an avant-garde experimentation based on the pace of the images, with metric editing and a music soundtrack, into a genre film in a free structure that inverts the traditional subordination of form to plot. In presenting *Rengeteg* (The Forest) in 2003, Benedek Fliegauf showed himself to be a filmmaker committed to contemporaneity, sketching a fragmentary portrait of an urban population trapped in a tedium life, an existential crisis and a lack of prospects.

In previous years, the Festival showcased new voices in Polish cinema (an essential witness to the reconstruction of a society after Communism) and the Baltic Republics, with well-known names that included Lithuania's Sharunas

Bartas. It also anticipated *nouvelle vague* in Argentinean cinema in the shape of a very interesting film called *Sábado* (Saturday), by Juan Villegas. Finally, it showed a great interest in filmmakers from the Maghreb, providing a window onto a culture and a number of societies that are as close to us as they are unknown.

One of the bases of independent cinema has to be to establish itself as a tool for learning more about others, about things that are radically different. This is film not so much as an instrument for integration as a place of extreme confrontation with different views on the world.

In terms of aesthetics, L'Alternativa has also supported research into areas about new forms that have become progressively more central to the creative redefinition of the hybrid region in which film is located within the audiovisual sphere. Experimentation on the margins of orthodoxy, the expression of risk and the overlapping of film with other arts are aesthetic fields where the Festival has sought contributions.

Up until now I have looked at filmmaking as something that rewrites pre-existing images, as a fundamental device that rebalances subjects in the postmodern world (e.g., filmed diaries, self-portraits or film essays) and that focuses on time drifts and body politics. I would now like to add the consideration of the fragmentary or unfinished work that forms a key part of modern cinema and is symptomatic of the struggle for free creation in the face of conditioning factors imposed by industry. One of the best examples of this can be found in Nicholas Ray's latest work, *We Can't Go Home Again*, shown at the Festival in 1996. However, the question could also focus on a phenomenon that is very important to the creative economy of cinema, i.e., the arrival of new digital technologies. In this sense, the year 2000, with the change of the Millennium, marked a turning point for the Festival. As well as the traditional 35mm and particularly 16mm formats, the usual currency in independent cinema, it included the digital video format. A statement in the festival catalogue that took the form of a manifesto said that celluloid is expensive and that small digital cameras allow a high degree of autonomy, are accessible to practically everybody and, together with the domestic programs of the event, are a simple and low-cost tool for putting film within the reach of all users. This is the rediscovery of truly independent cinema, which cuts economic conditioning

factors to a minimum. It shows how films made with meagre resources can stimulate the most innovative and avant-garde creations. In the face of the numbers machine as a platform for the special effects that adorn blockbusters, L'Alternativa puts up new technologies as a tool of autonomous creation. And, of course, where there is autonomy of means there is also freedom of thought and expression. Outside of the mechanisms of the industry and entertainment, filmmakers can put themselves in an alternative position, an ethical position that is clearly a political option, i.e., the policy of margins developed over the 10 years of the existence of the Independent Film Festival of Barcelona. This is seen best in the most open, promiscuous and heterogeneous section in the history of the Festival, the section called "Free Screen", and in the most recent section, "Pantalla Hall", an open space for filmmakers without censorship or restrictions, programmed continually and located at the entrance to the CCCB auditorium. It is an extraordinary experiment that goes a long way towards covering the most essential elements involved in the spirit of the Festival.

Shadowy Zones

When a group becomes aware that it is going through a crisis, when it acknowledges a time of unease with respect to its own identity, it enters into a state of decentring which forces it to undertake a repositioning that is only possible by inhabiting shadowy zones, a non-man's land far removed from historiography and official discourses.

In this sense, Catalan cinema is a group in permanent crisis. It is a cinema without identity or definition that permanently seeks bases for determining its national character, navigating indistinctly between criteria of social portrayal, linguistic prerogatives and imaginary structures.

One of the core sections of L'Alternativa addresses this issue head-on. Since its establishment in 1997, the "Forgotten" section has sought a reconsideration of the bases of a possible Catalan cinema with the recovery of works by filmmakers banished from regular film history and condemned to oblivion who are indispensable to understanding what Catalan cinema is and could have been, because of their contemporaneity and way of

portraying an era or society, in an ongoing discussion with the political and cultural structures of their times.

Today we understand that the undervalued work of Julio Coll and Francisco Pérez Dolz, for example, is not only the most serious attempt to make genre cinema within the Catalan and Spanish frameworks but also a precise portrait of environments and urban geographies, with their human types. Today we consider the proposal of the Barcelona School as a remarkable aesthetic programme, where for the first time in Catalonia form was proposed as a mechanism of transgression or resistance ("Seeing as we can't do Victor Hugo, we will do Mallarmé", in the well-known phrase of Joaquim Jordà). In the same way, we should locate the singular contributions of non-mainstream but nonetheless essential artists who have made disperse or fragmentary works, such as Josep Maria Font, Ramon Masats, Vicenç Lluç and Cecília Bartolomé. We should begin, as the section did, with a fundamental milestone, the remarkable 1948 film *Vida en sombras* (Life in Shadows) by Llorenç Llobet Gràcia, an incredible piece of filmmaking which includes, in line with the imaginary source of its time, the impossible articulation of a classic story about the tragic wounds of war. This film, always devastatingly contemporary, points to the filmic device as a mechanism for producing and reproducing ghosts, a spectral deposit at a time when meaning was cut short. The film articulates *desire and film* with *desire of film* in a self-reflexive framework that is extremely unusual, not just within Catalan filmmaking but in Spanish cinema as well, and signposted a path that nobody wanted to follow. Its author, forgotten like the other filmmakers in this section, took refuge in the amorous intimacy of amateur filmmaking and eventually ended up impoverished and unrecognised.

The works of Josep Maria Font, Ramon Masats, Vicenç Lluç and Cecília Bartolomé are marked by an interest in documentaries, a field they all trained in or had some relationship with. Furthermore, they are bound by a certain transversal vocation between film and other disciplines, and particularly by a will to open Catalan filmmaking up to modernity and show new ways forward in film writing. Their works constitute an exceptional social portrait tackled from a personal point of view.

Josep Maria Font made the 1963 film *Vida de família* (Family Life), the most faithful portrait of the Catalan upper-

middle classes in the decade of the 60s and a merciless representation of a closed world based solely on economic interests and the symptoms of its decomposition. The director filmed the existential cry, the anxiety about life of a number of characters trapped in the contradictions of their social environment, where wounds from the past returned to make any attempt at reconciliation in the present impossible. A real film sense of the architectural relationship between characters and spaces, the elliptic writing and narrative void likens Font's extraordinary film experiment to the films of Michelangelo Antonioni, a filmmaker who had impressed him greatly during his time in Rome, but who was also condemned to incomprehension and oblivion.

Ramon Masats is a leading photographer in Spain but his equally interesting film work is as unknown as it is valuable. Documentaries paved the way to his only feature film, *Topical Spanish* (1970), a hybrid and free work which opened Catalan filmmaking up to aesthetics and the pop spirit, using an ironic viewpoint between satire and criticism about the reality of a country (Spain) apparently in the process of transformation but really trapped in the most ancestral elements of its past. Going against conventions and norms, it was unlike any trend and could not be categorised and hence failed to find a place in the narrow film panorama of the day. Masats later went on to try his hand at television, which was in its infancy at the time, but eventually returned to photography, where his incorruptible view had been born and would continue to act.

The Valencian Vicenç Lluç was another shrewd observer of Catalan society at the end of the 1960s. This can be seen in the 1969 work *El certificado* (The Certificate), a film that adopted the form of farce and the style of new filmmakers to observe from a critical distance the false appearances of modernisation in the society he was portraying. However, Lluç's most extraordinary contribution was to tackle the idea of filming the signature works of Catalan literature. His adaptation of *Laia* (1970) should have been a key moment in national filmmaking, but despite receiving the blessing of Salvador Espriu, it was mishandled, re-edited and mutilated. His next project, an adaptation of *Mort de dama* (Death of a Lady) ran up against numerous obstacles and was abandoned. Catalan cinema thus indefinitely postponed the debate about the relationship with its literary tradition, a point still to be resolved today.

Finally, Alicante's Cecília Bartolomé, the last person to have their works shown in the now defunct section, is particularly interesting for her testimonial films. Rather than opting for politically correct fiction, she presented a pressing and necessary documentary about Spain during the Transition in the diptych *Después de* (After) (1981).

Cinema and Thought

What does it mean to have an idea in cinema? One possible response is to consider a film as a block of thought concentrated in a certain period of time. The time it takes to create a film is the time of thought on the part of the filmmaker, while the editing, i.e., the writing of time, organises the images in the direction of meaning.

A type of filmmaking that questions the world and thought through the use of images was the currency of L'Alternativa when it came to recovering the work of a number of filmmakers who are essential to modern cinematography, whether through the employment of special retrospectives or in sections such as the abovementioned "The Unknown of the Known". In other words, films about ideas that attract a different type of viewer, one who is able to put his memory to use in re-reading the signs of the century, i.e., "for each eye to negotiate by itself," as Jean-Luc Godard said.

The history of a discourse can be traced in its images. The filmmakers of the new German cinema, invited to participate in the most recent Festivals, have built their programme of film renewal on protesting the oblivion of the fundamental historical fact in the genesis of the new German nation, i.e., the responsibility of its people with regard to the Holocaust. The strongly politicised denunciation of the basic lie of the Federal Republic, built on the silence of participation in the horror of the 20th century and a capitalist system imposed by the United States which renounced all cultural inheritance, was the driving force for key names in German filmmaking, including Alexander Kluge, Rainer Werner Fassbinder and Marguerethe Von Trotta. The implications of this silence, which fed an entire social construction that was asphyxiating and concealed underground violence, was reviewed by these directors from a critical perspective that combined the outburst of the denunciation and the passion of disoriented and subjected bodies with the reflex

mechanisms belonging to the dialectic process of history. Again, marginal figures, trapped in an opaque and hypocritical network, took the lead. The rebuttal of a servile and ordinary attitude and the spirit of revolt also spurred on many directors in this new cinema. This idea is taken to the extreme in the documentaries and fictional films of Werner Herzog, in the search for the absolute and the option of irrational mystery in the face of capitalist dehumanisation.

An extremely broad look at memory and history can be found in the full work of Chris Marker, the star of the last Festival. His films are built as a topography of memory organised in a series of different zones that the viewer has to walk through and which relate different registers of the history of humanity, the history of images and personal history, or autobiography. The question guiding the discourse is about the function played by the image and the objective seems to be revivification, i.e., providing a new ethic and new knowledge at a time when the hypertrophy of images is leading to the disappearance of facts.

Marker's works are the works of a sniper, built on solitude and intimate writing. This dimension, which combines an approach to reality as filmed material with the poetic 'I', is fundamental in the work of two of the great filmmakers of *post-nouvelle vague* who are barely known in our country and who were recovered by L'Alternativa: Philippe Garrel and Jean Eustache.

Both men make films of an irregular, multiform and radically different production. Both advocate extremes: the limits of foolishness in the case of Garrel and suicide in the case of Eustache. Their works raise the burning questions of modern film: the confrontation of the camera with aimless bodies that carry the fatigue of history and the impossibility of adapting to the social environment; the revealing of the truth within the fissures of reality; the divide between visual and sound framing.

In order to make this type of cinema it is obviously necessary to have producers willing to assume the risk involved with the adventure of free creation. To that end, L'Alternativa has been keen to acknowledge people such as Marin Karmitz and Elías Querejeta, the producers of some of the best films in European cinema. We also have to remember the actors, the raw material that carries the passions and ideas of the filmmakers and who are fundamental figures in the body-to-body dialogue established in contemporary cinema.

Closing

Independence, in the sense of opting for a different film model, curiosity for new audiovisual forms, the exploration of margins and non-official discourses, the recovery of forgotten figures, the consideration of film as a tool for thought and knowledge about the world, a didactic vocation and demand for an open and intelligent public. This has been the balance sheet of the ten years of L'Alternativa, the Barcelona Independent Film Festival. Now it is time to ensure it is upheld, its success is consolidated and the commitment involved with it is renewed. Now it is time to continue to support the aesthetics of resistance.

Notes

1. WEISS, P. *La estética de la resistencia (The Aesthetics of Resistance)*. Hondarribia: Hiru, 1999.
2. COMOLLI, J. "Pour un cinéma pauvre". In: *Cahiers du Cinéma*. Paris: Editions de l'Etoile, October 2003, no. 583, pp. 78-80.

The Quality of the Catalan Language Used on TV

Anna Estrada

Faced with problems that arise with regard to the use of the Catalan language on television programmes of a colloquial nature, particularly on Televisió de Catalunya (TVC), the Catalonia Broadcasting Council (CAC) commissioned the Llengua i Mèdia Group to prepare a report that analysed the quality of the language in the programming of TVC, BTV and Televisió Española in Catalonia and, in particular, in the programmes that generate the most viewer complaints.

The Llengua i Mèdia Group aims to study linguistic variations in the media. The research team, made up of professors from the departments of Catalan Philology and Translation at the Autonomous University of Barcelona (UAB) has been working for 15 years on different research initiatives, including three projects funded by the Ministry for Education, i.e., “Language Models and the Audiovisual Media, Radio and Television, in Catalan”, “The Relationships between Oral and Written Discourses in the Broadcast Media” and “Variation and Creativity in Subtitles”, which is currently being developed.

The report entitled *The Quality of the Catalan Language Used on TV* was prepared by Margarida Bassols, Josep-Anton Castellanos and Anna Maria Torrent (coordinator) with the assistance of Neus Faura, David Paloma, Albert Rico and Elvira Teruel.

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The Report on the Quality of the Catalan Language Used on TV

The report began with a brief historical overview of the use of the Catalan language on television, both with regard to supply and reception. It went on to include a short introduction to varieties and registers according to receiver and programme and a review of the evolution of the TVC language model.

The aim of the report was to diagnose the linguistic quality of television in Catalonia with regard to Catalan and to make a string of proposals (recommendations) to ensure the full linguistic ‘normalisation’ of Catalan on the television shown in Catalonia.

The body of the analysis is defined below. The sample used was based on criteria of time and diversity. It established the time period to study, which covered the months of December 2002 and January-March 2003, and the selection of the stations, i.e., TV3, K3/33, TVE and BTV. It also included a list of all the programmes analysed in line with the following classifications:

- Daily and non-daily news programmes and current-affairs reports and documentaries
- Sports programmes: live (broadcasts or panel discussions), relayed or prepared
 - Inhouse works of fiction: sitcoms and miniseries
 - External works of fiction: dubbed movies, miniseries, youth-oriented sitcoms, children’s and teenagers’ cartoons
 - Specialised comedy, entertainment or current-affairs talk shows involving discussions or interviews
- Game shows
- Special programmes

To explain the analysis procedure the authors then established categories for the following linguistic phenomena:

Phenomena A: rude and/or offensive expressions.

This section included words and expressions basically related to sex and scatology, such as *vés a cagar!*, *merda!*, *collons!*, *conyi!*, *fotre*, *la mare que et va parir!* (but not the euphemisms *fúmer*, *me càsum l'olla*, *coi* or *cordons*), and words and expressions that could be offensive to the public, the Church, women, homosexuals, etc., such as *sudaca*, *negre de merda*, *marieta*, *neneta*, *hòstia* and *redéu*.

Phenomena B: linguistic interferences, basically words taken from Spanish.

This section included the use of words, expressions or constructions that pertain to Spanish, which mainly arose from a lack of knowledge rather than for any stylistic effect, even though systematic carelessness was not ruled out in this aspect for stylistic reasons. For example, the lexical borrowing of expressions such as *reflexar* or *flux de diners*, or syntactic ones such as the omission of the pronouns *en*, *hi* or *ho*, *ens hem d'anar*, *has d'oblidar* [això], the incorrect use of pronouns (*donar-li voltes* instead of *donar-hi*) or mistakes of periphrasis, such as *tenir que* or *anar a fer*. The free use of foreign words, such as *coffee*, was analysed separately.

Phenomena C: colloquial or non-standard or inappropriate use of words or expressions.

Firstly, the authors included all the words, expressions or constructions of a colloquial register not recognised under the standards of the language, even in a colloquial register. They also included words and expressions that are tolerated and even defended by some linguists, such as colloquial constructions of the relative verb (*l'obra que se n'ha parlat tant*), pronouns (*els hi portaré el llibre per els portaré el llibre* or *els hi portaré* instead of *els el portaré*; *afanyem-se* instead of *afanyem-nos*), the use of prepositions (such as *des de que*, *les coses de les que et volia parlar*, *consistia en fer*, *s'atribueix a que*), the absence of the double negative (*ningú ho va veure*), agreement with the verb *haver-hi* (*hi han molts cotxes*), intensifiers or generalisers (*lo bo del cas*, *lo bé que m'ho passo*), and the words *bueno*, *carinyós*, *mimat*, *tio* and *nòvio*.

Secondly, they included expressions or words inappropriate to the register, such as *esclarir* instead of *aclarir*, *complert* instead of *complet*, *caire* instead of

caràcter, *finalment dir* instead of *finalment cal dir* or *direm*. This section also included the incorrect use of idioms or set phrases, such as *ho faré tal com raja*.

This classification made it possible to gather the information in an organised and systematic fashion, which facilitated quantification.

The main body of the report was devoted to developing the analysis. The results were thus quantified through the frequency with which each of the three-abovementioned phenomena appeared in each programme viewed and in the overall number of programmes of the same format (daily news bulletins, reports, live sports programmes, inhouse miniseries, films, etc.). The authors added assessments and comments of comparison about the linguistic quality of the different stations with regard to programmes of a same format.

To conclude the detailed analysis carried out, below is a chapter on general assessments referring to each of the groups of linguistic phenomena described.

With regard to the group of rude and/or offensive expressions (phenomena A), the report found there was a control in the selection of words and restraint when it came to mangling the language. Rude and/or offensive expressions and words were used when necessary and a particular and defined range were chosen, which had been assessed and decided upon over time by the people who work at the stations.

With regard to the group of linguistic interferences, particularly from Spanish (phenomena B), the report distinguished between:

- Programmes that featured practically no syntactic borrowing, i.e., did not use linguistic structures influenced by other languages (e.g., the construction *porto anys fent el mateix* instead of *fa anys que faig el mateix*) but which did feature some lexical borrowings, i.e., linguistic interferences of vocabulary (e.g., the use of the word *bueno* instead of *bé*). In this case, the authors of the report attributed it generally to a will on the part of the people responsible for the script or translation to widen the range of non-standard colloquial words or expressions (phenomena C) to a point beyond what is accepted under linguistic standards.
- Programmes in which there was a certain margin of improvisation and which presented lexical and syntactic

borrowings. In this case, the authors of the report found that both lexical and syntactic borrowings were due to a lack of linguistic ability on the part of the presenters and/or regular collaborators.

At the same time, and within this section, they established four groups of programme formats according to the degree to which they were influenced by Spanish (i.e., density of Spanish words and expressions).

- The first group was made up of foreign productions, news programmes and other programmes. The report found there was almost no Spanish influence in programmes with no margin for improvisation, and a residual amount in programmes with a certain margin for improvisation.

- The second group included game shows and prepared sports programmes. The report found a higher frequency of Spanish influences (lexical borrowings, Spanish vocabulary and morphosyntactic borrowings of a linguistic structure) in these programmes.

Although the density of Spanish influences were overall low and of little significance in these programmes, the authors of the report assessed the systematic use of this type of borrowings in prepared programmes as being negative and suggested they could be reviewed and corrected in subsequent broadcasts.

- The third group was made up of inhouse productions, sports programmes with discussions and special programmes (e.g., the TV3 Marathon), in which the frequency of linguistic interference was higher, particularly with regards the use of Spanish structures and words, as well as problems of phonetics (pronunciation) on the part of some actors and discussion panellists.

- Finally, the fourth group covered sports broadcasts, inhouse sitcoms (*Jet Lag* and *Plats Bruts*) and other humorous talk shows, which had the highest number of linguistic interferences in the programming analysed. The report distinguished between interferences detected in sports broadcasts, mainly due to a lack of linguistic ability on the part of some of the presenters, and the exorbitant entry of Spanish slang for comic purposes in humorous talk shows and inhouse sitcoms. Furthermore, the report detected that the humorous talk shows analysed often used borrowings without a comic purpose, with abundant morphosyntactic structures that had been interfered with and Spanish phonetics.

With regard to non-standard or inappropriate colloquial words or expressions (colloquialisms) (phenomena C), the results of the report showed a direct relationship between the degree of spontaneity of the different programmes and the appearance of colloquialisms. In general, colloquial words or expressions were absent or scarce in programmes that used a prepared language, while in programmes where linguistic control fell they appeared more frequently. However, the report found there were programmes with planned language that featured a high level of colloquialisms, such as sitcoms and inhouse miniseries, something it attributed to the interest of the person responsible for the script in symbolising the characters.

Within this section, the authors of the report considered lexical colloquialisms (slang words and expressions) to be appropriate when they appeared in scripted programmes or live shows, as they can be necessary to correctly reproduce particular environments, situations or characters. With regard to phonetic colloquialisms (i.e., pronunciation), they found that most pertained to the way people speak in a low or medium register of formality¹. With regard to syntactic colloquialisms (i.e., grammatical structure), they did not believe it was counterproductive for them to appear in programmes in which the accepted or colloquial register dominates, but they did say that all types of imprecision and inappropriateness of register should be avoided.

Recommendations

In keeping with the initial goal of preparing a number of proposals that could be used as recommendation for television stations to adopt, the final chapter of the report developed a section on recommendations for each of the linguistic phenomena analysed throughout the research work.

In relation to the inclusion (or not) of rude and/or offensive words and expressions, they put forward the following criteria:

a) Criterion of Broadcasting their Use

The report concluded that programmes that broadcast rude words or expressions usually do so to be funny and, in that case, could have a major role in influencing linguistic use.

b) Criterion of Necessity

The report found that a diversity of solutions was required

to build the different registers that a 'normal' language should have and that swear words were present in the colloquial reality, a primary source of the language of fictional scripts. The colloquial register is therefore essential to linguistic regeneration, to the entry of speakers and generations of speakers, and the planned pseudo-colloquialism of television programmes represents an inevitable opportunity to make a recognisable language for many speakers who move fundamentally in this level of formality, to favour identification with the medium.

c) Criterion of Verisimilitude

The authors of the report recognised that in a fictional text, naturalness and verisimilitude are able to impact viewers' feelings and rationale and make them 'believe' in the character proposed, even though this sometimes requires making concessions to vulgarity.

d) Criterion of Discrimination

The report concluded that television uses a significant amount of rude and offensive words only in comedy programmes and some dubbed films, and that the selection was made nearly for stylistic reasons or for purposes of narrative consistency.

e) Criterion of Quantity

Although the results of the report found that the number of swear words heard in programmes was not high and were usually found in very particular programmes and at particular times, some dubbed films far exceeded a reasonable limit. In this case, television stations should warn viewers before a programme begins so they can understand that they cannot clean up the original language of the script.

f) Criterion of Broadcasting

The report defended the television specialists who have spent more than 20 years planning the progressive entry of swear words to achieve a model that can be assimilated by the audience.

g) Criterion of Acceptability

In line with the data in this report, the words used in the section on rude and/or offensive expressions were fairly authentic in the case of planned languages, although the occasional non-acceptable word got past them, for example in sports discussions (spontaneous), sitcoms (recorded live) and humorous talk shows.

h) Criterion of Adaptability

The authors of the report found that rude linguistic choices

were always motivated by situation, script or character rather than being gratuitous.

Based on the above, the authors of the report made the following recommendations:

- **Warn the audience:** to continue to indicate in the most significant cases that a film could offend some viewers because of the rude language or facts it contains.
- **Apply the Diversification of Registers:** to continue with the process of diversifying registers. Screenwriters and linguistic services have carried out a lot of very interesting work in this area.
- **Take Children into Account:** to continue to think about products addressed at young adults because the other age groups can generally be attracted by the arguments and jokes they generate. Candidness, inexperience, impulsiveness, a sense of criticism and humour are real mental regenerators.
- **Apply Discrimination in Use:** to try as far as possible to use rude words that truly belong to Catalan and to always seek a solution that upholds a sense of verisimilitude.
- **Use a Monolingual Code:** to try to avoid a bilingual code as far as possible, even in the use of swear words. It does not seem inconsistent that a character should use Spanish for script reasons or for parody, but it does seem inconsistent if he changes continually from one language to another.

With regards the use of linguistic interferences in the Catalan language used on TV, the report had two basic recommendations:

- To take greater care in preventing the appearance of interferences in programmes with a certain degree of spontaneity.
- To limit the deliberate appearance of interferences in programmes that aim to recreate the colloquial reality.

In this section, and with regard to programmes with a certain degree of spontaneity (some general or specialised news reports, programmes, interviews, discussions, game shows, etc.) the authors also recommended that presenters and regular collaborators know about authentically Catalan phonetics and have a good knowledge about the terminology that belongs to the issues raised in the programme.

To that end, the authors of the report believed it was necessary to contract professionals with an appropriate linguistic ability.

With regard to fictional or real programmes that reproduce colloquial situations, it is important to distinguish between:

- Inhouse sitcoms, for which the report recommended approximating script language to the plausible solutions of externally produced series (i.e., to seek a genuine Catalan that alternates with Spanish solutions to turn the current trend around), preventing 'inadvertent' syntactic interference and correcting the inauthentic phonetics of some characters.
- Comedy programmes, for which the report recommended that the presence of the Catalan language should be dominant and that the use of Spanish should be used as a humoristic device limited to comic exceptions within genuine formulas.

In relation to the inclusion (or not) of colloquial words and expressions, they put forward the following criteria:

a) Criterion of Broadcasting their Use

The authors of the report recognised that some words or expressions commonly used in colloquial lexicon (*bueno*, *despedir-se*, *nòvio*, *tonteria*, etc.) are used very often in the real language, as well as some morphological forms (*masses*, *prous*) and syntactic structures (*el/zi* –or *els hi*–, the neutral *lo*, colloquial relatives, etc.), i.e., they are very common living structures in informal language. They were aware that neither linguists nor grammarians will ever be able to eradicate them.

b) Criterion of Necessity

The authors of the report found that colloquial words and expressions were often necessary because they filled a gap: although Catalan has semantically equivalent terms and expressions, they do not belong to the colloquial register. Furthermore, the most commonly used colloquial morphological forms and syntactic structures are appropriate to this register and their replacement by the recommended standard equivalents does not form part of spontaneous speech or scripts that simulate spontaneous speech.

c) Criterion of Verisimilitude

The authors of the report found that some words and structures, such as slang expressions, are essential for

achieving verisimilitude with characters whose portrayal pertains to social groups that regularly use this language.

d) Criterion of Discrimination

In accordance with the results of the research work, Catalan television stations have not made free and indiscriminate use of slang expressions. Their presence is thus limited to inhouse dramas and, to a lesser extent, comedy programmes that use a fairly spontaneous language and within these programmes are only used by some of the characters that appear, according to their social and generational portrayal.

e) Criterion of Quantity

As slang expressions only appeared in miniseries and humorous talk shows, according to the authors of the report, the average transmission time of these programmes is very short compared with the other programmes in which the register used is more often than not the standard one.

f) Criterion of Broadcast Time

Given that the majority of the programmes that contained lexical or syntactic colloquialisms were broadcast at night, the authors imagined there would be no children watching (children being more likely to assimilate linguistic innovations).

g) Criterion of Acceptability

The report found that many of the non-standard linguistic structures used on some television programmes were defended by linguists and grammarians as belonging to daily and colloquial language and that some specialists were even calling for their acceptance and a review of the standards so they could be recognised as valid in informal registers.

h) Criterion of Adaptation

The authors were aware that in informal situations it is hard to replace colloquialisms (even phonetic ones or ones of pronunciation) with corresponding standard ones without damaging the register.

Based on the above, the authors of the report made the following recommendations:

- **Discriminate the Use of Slang Words:** to use slang lexicon only in miniseries and humorous talk shows in which the portrayal of the characters or presenters demands it and eliminate it from other types of programmes.
- **Increase amount of Youth Programming:** to increase and diversify the range of programmes aimed at youths, so

that, apart from humorous shows and sitcoms with colloquial or vulgar language, there were other programmes in which language would not be a problem.

- **Warn Audiences:** to warn audiences, using a symbol or logo, that a programme uses colloquial language with problematic, unaccepted or dubious expressions.

- **Promote Applied Research:** to encourage research in universities and in collaboration with linguistic advisory departments at the television stations on colloquial language applied to the media and make proposals for using lexicon that belongs to this register, so that stations can make the appropriate recommendations for using it. They also recommended in-depth research into the grammatical structure of languages which, although not accepted, does not arise from interference and which has a long and homegrown tradition in the colloquial register.

All in all, a large part of the interest of this report lay in the proposed recommendations, as “the colloquial register has an increasing presence on TV”², in line with the conclusions from the Congress on Colloquial Catalan On Television that the Llengua i Mèdia Group organised in the Faculty of Communication Sciences at the UAB on 22 January 2004, and that it is important to develop linguistic guidelines in this regard.

Notes

1. That is why they justify their proposal to review the harsh criticism of the Institute of Catalan Studies (IEC) when it comes to tolerating the use of some colloquial words and expressions.
2. Llengua i Mèdia Group (2004) *Conclusions de la Jornada sobre el català col·loquial a la televisió*, at: <http://kane.uab.es/llenguaimedia/Conclusions-Jornada.pdf> [consulted on 12 May 2004].

Webs Review

The World of Radio

In this issue, *Webs Review* presents a selection of links on the radio sector and in particular on digital and Internet-based radio.

World DAB Forum

Fòrum Mundial de la Ràdio Digital

www.worlddab.org/

The WorldDAB Forum is a non-governmental international organisation that coordinates the implementation of DAB (digital audio broadcast) services. It represents more than 100 companies and organisations from all sectors of the audiovisual industry in 30 countries, including public and private operators, manufacturers, providers, regulatory organisations and government bodies. The Forum's website can be used to consult regulatory documentation, articles and other technical and trade texts on DAB.

Foro de la Radio Digital

www.radiodigitaldab.com/index.htm

Forum de la Radio Digital is a member of the WorldDAB Forum. It was established in 1998 with the aim of promoting digital radio in Spain. It is made up of public and private broadcasters, network operators and transmitter and receiver manufacturers. Its work is articulated around three main areas: technological, legal and commercial. The website, in Spanish, reports on the practical details surrounding digital radio transmissions: where to buy a receiver, current coverage, models for computers, cars, homes, etc.

Annuaire de la radio

www.annuairedelaradio.com/

An exhaustive directory of French radio stations, listing all the stations with a website, classified by type (public, private, local, online, digital, satellite, pirate, etc.). It includes resources on broadcasting in France, such as institutions, associations, history, archives and radio presenters and has links to information on the international radio scene.

What you need to know about radio ***radio.about.com***

A virtual community by About.com devoted to radio and coordinated by Corey Deitz, a US radio broadcaster. The website features the most up-to-date news and a great many radio-related links, including a glossary, directories, history, publications, etc. In English.

Super Radio - Guide to Radio Stations in Spain ***www.guiadelaradio.com/***

The online version is a summarised publication of the guide of the same name. This directory classifies all the radio stations in Spain by province, regardless of whether they are on the Internet or not. It also offers other resources, such as links to programme websites and the sites of radio stars, articles, etc. It has daily updated news reports, an archive for the past five weeks and online broadcasts.

BBC Radio

www.bbc.co.uk/radio/

The website of the radio section of the BBC makes it possible to listen live, or for up to a week following a broadcast, to a number of programmes classified by genre. It also facilitates access to all its stations, e.g., Radio 1 and the BBC World Service and has a section devoted to digital radio.

Media UK Internet Directory: Radio

www.mediauk.com/directory/radio/index.html

This website includes a list in alphabetic order of the different radio stations in the United Kingdom. It includes information on each registered station, including contact information, coverage area, frequencies, schedules, etc. There is also a list of the most recent news stories concerning the radio sector.

Live365.com
www.live365.com

Live365, which began in 1999, is a major network of online broadcasters created by users and structured by music genre. It broadcasts from 100 different countries and has millions of listeners. For a monthly fee, Live365 provides the software and infrastructure so that anyone with a computer and Internet access can listen to an Internet station.

Web Radio
www.web-radio.fm

An online radio service. This site provides access to a list of 10,000 radio stations, 4,000 of which also broadcast online. They are classified by alphabetic order, format, state (US and Canada) and country. There is also a section with a list of broadcasters that transmit only over the Internet. It also includes the biggest news headlines on radio-related issues.

OneWorld Radio
radio.oneworld.net

International community of radio presenters and producers who share programmes for development. The OneWorld network is made up of 1,500 organisations from over 80 countries. These organisations work for sustainable development, peace and human rights and are the main sources of information on the network. The site contains a radio search service.

ClandestineRadio.com
www.clandestineradio.com

ClandestineRadio.com was established in 1996 and is defined as the only online portal devoted to the study of clandestine and subversive radio. As well as a directory of clandestine broadcasters across the world, the site includes an interesting sound library and information on the broadcasters, whether currently active or not. Each fortnight it publishes a bulletin called Clandestine Radio Watch which gathers information for tracking psywar developments across the globe.

Ranet
www.ranetproject.net

Ranet is a consortium formed by different organisations. It is a project that combines radio and the Internet to disseminate information on the weather and climatology of the whole of Africa. Ranet helps marginal communities interpret weather forecasts and meteorological and environmental information. As weather plays a fundamental role in the communities of nearly all Africa with regards agriculture, health or migrations due to natural disasters, Ranet is an essential tool for helping in these areas.

Radio Directory
www.radiodirectory.com/

Radio Directory is a specialised search engine for the world of radio. The thousands of links are classified by topics, including broadcasters, programming, music, research, advertising, etc. It also sends out a weekly newsletter that includes some of the most interesting links.

World Association of Community Radio Broadcasters (AMARC)
www.amarc.org/

AMARC is a non-governmental organisation at the service of the community radio movement, which brings together nearly 3,000 members and associate members from 106 countries. Community radio is characterised by the active participation of the community in the creative processes in generating news, information, entertainment and culturally relevant material, focusing on local topics and concerns. AMARC aims to support and contribute to the development of community and participative radio in line with the principles of solidarity and international cooperation. The International Board includes representatives from each continent.

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