

Competition, crisis, digitalisation and the reorganisation of local television in Spain

ÁNGEL BADILLO

Associate professor of the Department of Sociology and Communication in the Faculty of Social Sciences at the Universidad de Salamanca

abadillo@usal.es

Abstract

Local television in Spain has gone through a dramatic transformation over the last decade. After years of gaps in public policies, digital terrestrial television (DTT) switch-over, the decision of most regional governments to implement commercial competition in the autonomous sphere and the far-reaching crisis in advertising revenue have completely redrawn a sector that, just a few years ago, was the strategic target of large communication groups and today presents numerous doubts regarding its immediate future.

Key words

Local television, autonomous television, autonomic, community, alternative, public policies.

Resum

La televisió de proximitat ha patit una forta transformació a Espanya durant l'última dècada. Després d'anys de buit en les polítiques públiques, la reordenació del mapa audiovisual, conseqüència de la implantació de la televisió digital terrestre, la decisió de la majoria de les comunitats autònomes d'introduir competència comercial en l'àmbit autonòmic i la crisi profunda de la inversió publicitària han redibuixat un sector que fa pocs anys era objectiu estratègic dels grans grups de comunicació i avui presenta nombroses incerteses pel que fa al seu futur immediat.

Paraules clau

Televisió local, televisió de proximitat, televisió autonòmica, autonòmic, comunitària, alternativa, polítiques públiques.

1. Introduction: proximity broadcasting in global television competition

The aim of this work is to review, from an essentially descriptive perspective, the current situation of proximity television in Spain. Under the umbrella term *proximity broadcasting* we include all forms of public or private television that are broadcast at state level, which in Spain means public regional channels, the new private regional stations, municipal broadcasters, private local stations and non-profit stations. Although these are not reviewed in this paper, all stations that broadcast 'a-legally', or illegally, should be mentioned (depending on how loopholes in the regulations are interpreted) both in analogue and digital television. The research on this phenomenon in Spain has been useful because there are numerous regional case studies (Martínez Hermida 2001; Navarro Moreno 1999; Sabés Turmo 2002), but we agree with Casero and Marzal regarding the need to approach this phenomenon from a wider perspective which allows us to detect trends across the system (Marzal Felici and Casero Ripollés 2008).

From the first broadcasts of local Catalan non-profit television stations (see especially Guimerà and Orts 2006; Guimerà and Orts 2007; Prado and Moragas 1991) until today, the local television sector has undergone a formidable transformation

and has passed through very diverse stages, from a regulatory point of view to its development as an audiovisual market, to a movement towards digital determined by the European context (García Leiva 2006) and the possibilities of revenue for public finances provided by the digital dividend. In the following pages the sector's public policies are reviewed, as well as the situation in each regional provider's territory, both local and community, to particularly understand the current situation regarding the proximity television system and the public/private split in the Spanish broadcasting sector below the level of state.

2. The public/private split of autonomous television

The situation regarding public television in Spain has been particularly complicated in recent decades, especially due to the unsustainable model designed by RTVE in the Radio and Television Statute (Act 4/1980, of 10 January, on the radio and television statute), which was immediately adopted by regional public television stations. In recent years, the institutional redesign of RTVE to the State Act 17/2006, of 5 June, on state-owned radio and television and the public assimilation of the huge public debt have served to provide a new opportunity in state public television, but this transformation

Table 1. Providers of television service in Spain according to ownership (2010)

Television service provider in Spain		Ownership		
		Public	Private	Third sector
Broadcasting areas	Spain	RTVE	Antena 3 TV, Sogecable, Telecinco, laSexta, NET TV, Veo TV	—
	Autonomous communities	Autonomous radio and television stations	Private autonomous stations	—
	Municipalities or local groups	Municipal stations	Private local stations	Community television (currently being regulated)

has not happened at a similar level to autonomous public television.

Regional television stations appeared in Spain because of the decentralised political model recovered by the 1978 Constitution. Given the possibility of following a decentralised audiovisual model supervised by TVE, the regional communities assumed their statutory responsibility to start up public bodies with RTVE (Act 4/1980, 10 January, on the radio and television statute) as a model (Mateo Pérez and Bergés Saura 2009), and with the third channel Act (Act 46/1983, of 26 December, governing the third television channel) as an enabling instrument (in all cases except the Basque Country). After an initial stage, which the regions considered “historical” and created their regional stations in their own languages, in the second half of the 1980s a second set of autonomies was established, to which we add a final group must be added of public bodies, created in 2000, to complete the current 13 (see López *et al.* 1999). Thanks to the availability of frequencies brought about by the National Technical Plan for digital terrestrial television, all have at least two terrestrial broadcasting channels within the autonomous community’s multiplex. Only Castile and Leon, Cantabria, Navarra and Rioja have no public radio/television. The model designed in 1983 remains unchanged, which has resulted in controversy concerning the political use of these media, the deficit accumulated and even the possible illegality of the dual financing model (advertising and public subsidy)¹ (Llorens 2005; De Moragas and Prado 2000).

With this critical context as a background, in the last decade a privatisation movement has developed in regional television, driven particularly by conservative political forces. The first gesture in this direction was the awarding in 1998 of the content of the Canary Islands’ public television to Productora Canaria de Televisión, a company owned by Prisa and local firms which manage the channel Canal Canarias; afterwards, in 2005, Aragón Televisión decided to outsource part of its production to Chip Audiovisual and Mediapro (Fernández Alonso 2002; Mateo Pérez and Bergés Saura 2009). The third channel Act did not allow for the privatisation of public regional stations

(nor is it allowed now by the general Act on audiovisual communication), so that the Partido Popular (PP) tried to modify it² in the 1996-2000 legislature. A lack of consensus with their parliamentary members ended this proposal, but the rollout of digital terrestrial television allowed the PP to clear the way for the awarding of autonomous licences for private digital television, which afterwards appeared in many areas, according to the deregulatory desire of each regional community.

The state of autonomous community broadcasting is very different in each community and for this reason it’s important to briefly review each of them:

1. Andalusia: has had a public provider since 1988, RTVA, which broadcasts various terrestrial channels. In 2007 and 2008 the four private regional channels were put out to tender, won by Prisa, Vocento, Prensa Ibérica and the Joly group. Of these, only Vocento (Canal 10) and Prensa Ibérica (with various brands, such as Málaga TV or Canal 21) operate now and Prisa has resigned its licence.

2. Aragón: 2004 started up the public station CARTV, which is broadcast by Aragón Televisión. There was no autonomous private television tender.

3. Asturias: RTPA was created in 2004, which broadcasts two public signals throughout the region; in 2007 a licence was granted to the Prisa group for a private regional channel, which is in the process of being returned.

4. Canary Islands: RTVC began in 1998; in 2007, the government in the Canary Islands awarded the two digital terrestrial television licences with regional coverage (DTT-A) to COPE and Antena 3 Televisión Digital Terrestre de Canarias.

5. Cantabria: the regional government has repeatedly insisted that it will not create regional public television (*El Diario Montañés*, 17/03/2010). In 2006, the Cantabrian government held a tender for DTT-A providers, but it was declared void.

6. Castile-La Mancha: public television started in 2000 under the name of Castilla-La Mancha Televisión. The tender for regional private companies ended in 2010 with three definitive licences, which Green Publicidad y Medios, La Regional de Castilla-La Mancha and Radio Prensa y Televisión received; the fourth licence, received by the newspaper publishing group

La Tribuna was returned after the Castile and Leon group Promecal terminated its activity in Castile-La Mancha media.

7. Castile and Leon: there is no public provider. The regional private licence given in 2009 consists of two signals: one single frequency and the other with provincial disconnections. The tender winner was the company formed by the merger of the two pre-existing local television networks of the region (Canal 4 and Televisión Castilla y León). Municipal local television was also soon regulated, although no licence has been awarded as yet.

8. Catalonia: Catalan public radio/television (CCRTV) started in 1983 and has the most terrestrial broadcasting signals (five in total). It competes with the Godó group for the regional private licence granted in 2003 by the Catalan government to Emissions Digitals de Catalunya. Unlike other autonomous communities, the private provider has a complete digital multiplex at its disposal (actually, nowadays it broadcasts three different signals).

9. Community of Madrid: its public body, RTVAM (TeleMadrid and La Otra), was created in 1988. Madrid was the first to hold a regional private tender in 1999, and the Vocento group (which operates as Onda 6) won the licence, along with the now extinct Quiero Televisión which, in ceasing to exist, left the licence empty until today, despite the unsuccessful attempt of the regional government to put it up for tender again in 2005.

10. Community of Valencia: as well as the public RTVV, operating since 1984, the Community held a private regional tender, which the Vocento group (La 10) and COPE (Popular Televisión) won in 2006.

11. Extremadura: the public group Corporación Extremeña de Medios Audiovisuales (CEXMA) has broadcast the channel Canal Extremadura since 2004. The regional government held a tender for private licences in 2007 which was won by Kiss Media and the Prisa group (which gave up its licence).

12. Galicia: from 1984 the public channel TVG has been broadcasting as part of the regional corporation CRTVG. In 2005 two private regional licences were given to Popular Televisión and La Voz de Galicia.

13. The Balearic Islands: in 2004 the public station IB3 was awarded the licence for the third channel. The tender for the private regional licence in 2006 was won by Prisa (which gave it up) and Unidad Editorial.

14. Rioja: without a regional public provider, the community held a DTT tender; the result came at the end of 2001 and found in favour of Rioja Televisión (Vocento) and Popular Televisión, which both have two channels each.

15. Navarra: has no regional public provider and, in 2004, the regional private tender was carried out, won by two channels – Canal 6 Navarra (linked with the Castile and Leon Promecal group) and two more for Canal4 Localia Navarra.

16. Basque Country: was the first community to start its own public television station, the EITB, in 1982, under the Statute of Autonomy. There are no private autonomous providers.

17. Murcia: in 2005 Radio Televisión de la Región de Murcia (RTRM) began, which now broadcasts two autonomous channels. The private licence was won in 2006 by Televisión Murciana, SA, La Verdad Radio y Televisión, SA and Televisión Popular de la Región de Murcia, SA.

There are therefore four ways of resolving the public/private split in regional broadcasting:

a. First, the solution of communities that prefer to protect their public radio and television companies as much as possible, and open up competition to local but not regional markets. This solution is used in Aragon and the Basque Country.

b. Those that do not have regional public bodies and have chosen to give more than one channel to private providers and protect them as much as possible from local competition. This is the case with Navarra, Rioja (these two have the same model of two providers that compete amongst themselves with two channels each) and Castile León (with one private regional provider).

c. The more common solution, where regional private competition has been fragmented among public providers. Here the solution has offered each provider one channel from the private regional multiplex to compete with the regional public body. Andalusia and Castile-La Mancha won four channels in the tender, but the most frequently used option has been to incorporate two private providers (with one channel each).

d. The fourth model, used only in Catalonia, is to offer all the private regional multiplex to one provider. No other autonomous community has followed this model.

3. The new post-DTT local television scenario

Regarding local television, for various decades the sector has moved amid regulatory uncertainty, until State Act 41/1995 was passed, of 22 December, on Local Terrestrial Television, which tried to structure the sector, and after in an 'a-legal' context (Prado 2004), in which for years the entry of all types of firms was allowed in a process that has been called "covert deregulation" (Badillo 2005; Badillo 2004; Badillo and Moreno 2004) ending with the switchover to digital terrestrial television. State Act 53/2002, of 30 December, on Fiscal, Administrative and Social Order Measures proposes the basic state framework by fixing the scope of local television coverage, not according to municipalities but "demarcations", based on population criteria, from provincial capitals and towns of more than 100,000 inhabitants. The law also incorporates the novelty of reserving a quarter for each multiplex (a channel) for municipal management. On this basis, the previous Partido Popular government designed the National Technical Plan for local digital television (RD 439/2004), modified slightly afterwards by the government of the PSOE (RD 2268/2004). The autonomous communities, in exercising their powers, have held tenders to award licences.

The diversity of situation in each autonomous community makes it even more necessary to review the situation case by case:

1. Andalusia: the government in Andalusia started the tender to award local DTT licences in 2006, and completed it two years later, only a few months after they had granted licences to regional private providers. The councils that had requested the corresponding licences have been receiving them since 2008, and now there are 28 municipal licences (another ten are being processed and 34 have been declared void). Of the 157 effective private licences, Green Publicidad y Medios (with 28) and Alternativas de Medios Audiovisuales (with 19) are the providers prevalent in most areas.

2. Aragon: the community has awarded licences to four councils to operate in local DTT, which must be added to the 22 private (having discounted those returned by Prisa) awarded in 2006, amongst which 6 licences granted to Producciones de Entretenimiento stand out, or the three that the La Comarca and El Heraldo de Aragón groups received.

3. Asturias: of the 21 licences granted by the Principality in 2007, the highest number were 6 to Editorial Prensa Asturiana (Prensa Ibérica, editor of *La Nueva España*), followed by 5 to Canal 48 Occidente. No municipal licences were granted.

4. Canary Islands: the tender was decided in 2007 with the award of 46 private licences for local and island coverage, while eight channels were also given to municipal corporations and island councils,³ although in 2009 the Canary Islands government mentioned the possibility of incorporating even more providers in the market because of high demand (Europa Press, 17/06/2009). Canal 8 (4 licences between local and island groups) or Prensa Ibérica (3) are the licence holders present in most areas.

5. Cantabria: after a first call to tender in 2006 was declared void, in January 2009 a local tender was organised which, to date, has not been decided. When the digital switchover occurred, the existing local stations gradually decreased their activity (for example, Canal8DM, Tu TV or Cantabria Televisión / Telecabarga, see EFE 20/07/2009), while others, such as AquíTV, PopularTV or Telebahía, have chosen to continue with analogue broadcasts while they await the results of the digital tender (ABC, 17/03/2010). The local press announced in 2009 the start of a multiplex on channel 24 which digitally broadcasts the signals of CantabriaTV, AquíTV and Telepromociones (*El Diario Montañés*, 15/07/2009).

6. Castile-La Mancha: the local television tender was decided in July 2009 when 72 licences were awarded to private providers and a reservation was made for one channel for each area for councils that wanted to have their own channels. Although there are no municipal licences given under regional media law, there is evidence that some councils already operate in DTT under trial conditions. In the case of private providers, the regional tender, once closed, saw numerous duplications, by which Green Publicidad y Medios (CRM, with 5 local licences) and Radio Prensa y Televisión (TVCM, with 14

licences) will be forced to give up one of their two markets (probably the local one).⁴

7. Castile and Leon: Although in 2005 the Castile and Leon council published a preliminary text which announced a local television tender in a few months, this never happened. Despite this, the merger between local television networks Canal 4 and Televisión Castilla y León and the current regional private provider has taken on much of the system, because the regional private DTT licence holder has, as well as a single-channel frequency, a channel for provincial coverage for each of the new provinces under the denomination CyL 8. There are no municipal broadcasts.

8. Catalonia: the tender closed in 2006 and produced a market of 50 private licences, while at a municipal level (where the regional community has extensive experience), the Catalan government has awarded 32 licences to councils and municipal groups.⁵ Of note is the government's decision to devote several complete multiplexes to municipal management, which led to complaints before the Supreme Court of Justice in Catalonia, which has ruled that tenders in these demarcations are void.

9. Community of Madrid: the first tender that took place in Madrid 2005, with 30 awards, was annulled by Madrid's Supreme Court of Justice following the contentious administrative procedure brought by various providers that did not receive a licence, such as Localia.⁶ In 2009, the Community of Madrid re-ran the tender, in which the same providers won the same demarcations. The audiovisual producer Enrique Cerezo, with 10 licences, received the most, together with Libertad Digital, Popular Televisión and Antena 3. There was only one municipal licence, belonging to the city.

10. Community of Valencia: the Valencian tender was decided in 2006 with the awarding of three private licences to each multiplex to all the demarcations except for four, which were put to tender in 2010. The Mediamed consortium (which runs the Tele7 brand), Libertad Digital and the newspaper publishing house *El Mundo* received most of the licences. A regulation exists for requests from local councils, some of which have received the respective licences to operate.

11. Extremadura: the autonomous government held its first tender in 2006, which was declared void two years later, then held a new procedure in 2008 which resulted, in May 2010, in 24 channels being allocated and a further 27 void. Canal 30 Cáceres, Producciones Audiovisuales del Norte de Extremadura and the entrepreneur Francisco Javier Morillo Benegas received the most licences. There were no municipal licences.

12. Galicia: the tender for private local providers was held at the same time as the regional, but was decided later, in 2006. After the tender ended, in 2009, the Supreme Court of Justice in Galicia annulled the licences for Pontevedra and El Ferrol, so, effectively, only 40 licences were given (discounting the 17 void ones), which are mainly in the hands of the community's leading newspapers. The regional government has planned to implement a procedure for council applications, although there is no evidence of any operating.

13. Balearic Islands: tenders were held for local and island television with both private and public providers. There are 34 privately allocated licences (28 local and 6 island). There are only three public licences, all for island coverage.

14. Rioja: the regional government has not yet announced a local DTT tender.

15. Navarra: only five private licences have been granted to date in Navarra, one in each local community charter multiplex, all to Popular Televisión. There are no municipal licences.

16. Basque Country: the local tender was decided in 2007 with the awarding of 58 licences. Guipuzkoa Televisión and Hamaika obtained the greatest number. Only Donostia has a public municipal licence.

17. Murcia: the 24 private licences awarded in 2006 were to La Opinión de Murcia, Canal 21, Libertad Digital and the Grupo Empresarial de Televisión de Murcia. Regarding municipal television stations, once access to licences had been regulated for councils and one channel was reserved for municipal use in each local multiplex, the autonomous government has granted licences to those providers applying for them.

Therefore, 662 private and 96 public licences were awarded to both local and island groups. Although the picture for providers appears more stable than ever in the local sector, it's still subject to short-term changes: temporary provision number ten of audiovisual communication's new general Act warns that operators who have not started their broadcasts at the right time, or those who have interrupted them, will lose their licences. The same provision announces that, by May 2012, the DTT technical plan will be revised according to the ultimate occupation of frequencies.

In any case, reviewing the facts confirms that one of the fundamental characteristics of local television is its definitive inclination towards private, not public, providers (Corominas *et al.* 2007), for whom 75% of each multiplex's capacity is reserved, and which highlights a remarkable difference in the make-up of the private-public split in autonomous television. In nearly all the tenders, it's easy to discern a clear political orientation in the awards given, which only in one case were supported by reports from regional audiovisual councils (Bustamante 2008).

Table 2. Private licences for local and island DTT (May 2010)

Regional community	DTT-A	DTT-I	DTT-L	Overall total
Andalusia	3		157	160
Aragon			22	22
Asturias			21	21
Canary Islands	2	14	32	48
Castile-la Mancha	3		72	75
Castile and Leon	2			2
Catalonia	4		50	54
Ceuta			2	2
Community of Madrid	1		30	31
Community of Valencia	2		42	44
Extremadura	1		24	25
Galicia	2		40	42
Balearic Islands	2	6	28	36
Melilla			2	2
Navarra	4		5	9
Basque Country			58	58
Murcia	3		24	27
Rioja	4			4
Overall total	33	20	609	662

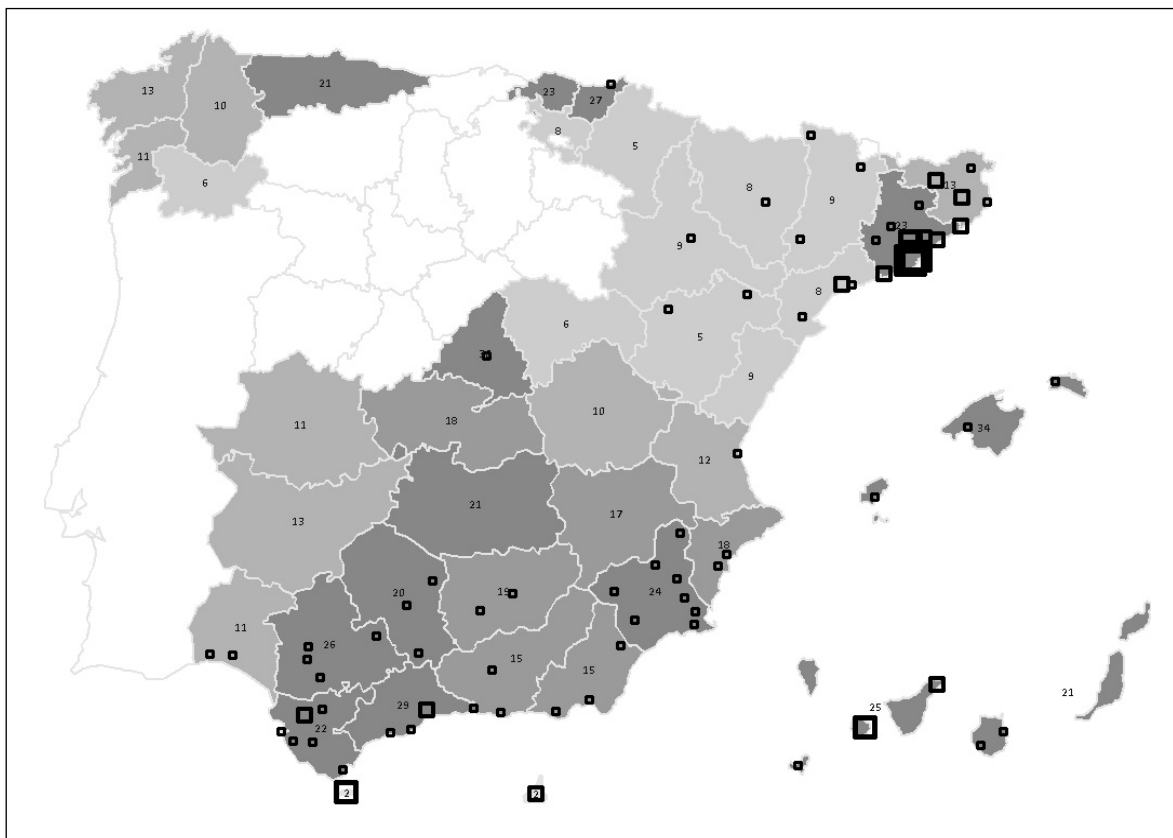
DTT- A: Digital Terrestrial Television with autonomous community coverage

DTT- I: Digital Terrestrial Television with island coverage

DTT- L: Digital Terrestrial Television with local coverage

The overall total reflects the licences published in the official journals of the autonomous communities (whether broadcasting or not), having eliminated those declared void or those returned by the winners at any point in the process.

Source: Author, with data from the regional communities' official journals.

Illustration 1. Licence holders of local and island digital terrestrial television in Spain

Source: Author. The number shows the private licences given to each province and the box scales by size the public licences granted. Only the licences awarded are shown (the void licenses, the returns or those pending a decision are excluded).

4. Community television, pending regulation

Community television stations are very scarce in Spanish proximity broadcasting. The European Parliament's report on community media in 2007 recognised the existence of only three community television stations in Spain — together with 130 radio stations — (European Parliament 2007). Despite the fact that European institutions (Council of Europe 2008; Council of Europe 2009; European Parliament 2008) recognise the importance of alternative media, community audiovisual media have not found a place in Spanish public policies. The additional provisions fifteen and eighteen of Act 56/2007, of 28 December, on measures to promote the information society, contained the most recent attempt to protect this type of media.^{vii} This text, which talks about “proximity television stations” in order to differentiate these from commercial ones, prohibits them from broadcasting advertising or telesales (even though sponsorship is allowed) and refers to the future development of a technical plan and the provision of a general regulation of the service, because it is these regional communities that grant the licences, which will be non-transferable and incompatible with commercial licences. In any case, the law warns that the planning of the spectrum for these stations “is

not a priority when compared to other planned or feasible services”, and what will be used are “frequencies which, because of their use by upcoming services, are not available for commercially viable television broadcasting services”. This gives a clear idea of the legislator's position regarding this type of television station. Article 32 of the 2010 law on general audiovisual communication (LGCA – General Act on Audiovisual Communication) recognises the possibility for non-profit entities to provide audiovisual services, and the central government is expected to provide frequencies for this type of media, and they will be able to obtain specific licences. The audiovisual authority is responsible for verifying that the operational expenses of community stations do not exceed 100,000 euros per year. Temporary provision number fourteen of the LGCA provides for the statutory regulation of licences for this type of media, while respecting existing areas of authority, and recognises the seniority of “non-profit community communication services which were operating before 1 January 2009 [...]”.

In any case, the model applied for the digital switchover for local television has clearly served to eliminate the few experiences in local television of the third sector that existed in Spain in local television. Forced to compete with private firms, and without any frequencies being reserved in any autonomous

community, non-profit television has been swept from the Spanish audiovisual system in the only field (local) in which some experiences had survived. It has only been possible to confirm two licences (in Castile-La Mancha and the Basque Country) where the holders presented themselves in the tender as non-profit entities, although they had to compete under the same conditions as private companies. Unfortunately, Bustamante's prediction from two years ago has become reality, that "the structure drawn for future digital television, regionally and locally, not only shows a loss of public weight and the almost total marginalisation of the association sector but also, overwhelmingly, a private architecture that overly favours national and local media groups" (Bustamante 2008).

5. Reordering of operators, commercial competition and advertising crisis: features of local television in Spain

Although some tenders still have to be held, and some providers have provisional licences after confirming they meet all the initial requirements, with various appeals brought via contentious administrative proceedings before the Higher or Supreme Court of Justice and while many demarcations are currently setting up their multiplex management system, the conclusions we reach in this work are provisional to some extent.

The first conclusion we can make about local television in Spain concerns the redefinition of the role of large groups in the sector. Once local and regional television has become an opportunity to resolve the limits of the national market, the expansion in the number of state coverage channels and the crisis in advertising have meant that national groups have tended to leave the sector. The most obvious case is the Prisa group which, in 2008, decided to close Pretesa-Localia and remove itself from local and regional broadcasting, at the beginning of the crisis and the restructuring of the business. Prisa has been returning its licences to each autonomous community (the situation is at different phases in each territory because it involves a slow administrative process), and all its broadcasts ceased on 1 January 2009.

Those who seem to have found a more defined space for growth in this sector are Vocento (which is unifying its private regional licences with the brand La10, for which it has even created a common broadcasting programming); COPE, which had to choose to accept new partners (the arrival of the Mexican Burillo Azcárraga, reformed as Popular-Mariavisión) to maintain its local and private regional television stations, and Kiss Media, with uneven implementation but with presence in some notable markets.

Other national groups have shelved their local and autonomous television projects: Unidad Editorial (with a national licence) is using its regional frequencies to broadcast the English learning channel Aprende Inglés TV; Uniprex

(Antena 3) fills its local signals with low-cost programming under the Ver-T brand, while Telecinco still seems to be using its licences. The same is happening a little with groups set up within an autonomous community: Prensa Ibérica does not seem to have a coordinated project yet for its numerous licences throughout the country (above all in Andalusia, Asturias, Canary Islands, Galicia and Murcia) and Godó group has concentrated on its private regional *super-licence* in Catalonia.

Some small groups have emerged in recent years as new and relevant players, particularly Local Media (a joint company of Teletoledo and Telebilbao) and CRN. The former has won a large number of local licences in Castile-La Mancha, the Basque Country and Andalusia. Local Media operates as a satellite content supplier through local television stations throughout Spain, but could now become one of the new operators of importance in the market. For CRN, Andalusia and Castile-La Mancha also appear to be its reference areas, and in both there are sufficient licences to become an important player in the sector. Other groups worthy of mention are those that are highly concentrated in a single regional market: Hamaika in the Basque Country (a project in which Euskaltel, *Deia*, *Gara* and Baintet participate), Canal Català in Catalonia and Tele7 in Valencia. At least in these cases some care can be observed in providing "proximity" or local content, against the tendency to de-regionalise the sector, which research has recognised as an immediate risk from years previously (Prado 2004). It appears that the businesses that were in the sector to exploit expensive fraudulent competitions or telephone calls have disappeared and, anyway, the restriction of available frequencies and high revenue resulting from the reuse of the digital dividend (García Leiva 2009) for telecommunication services is likely to have a very minimal impact on illegal broadcasts in the sector.

As noted above, the public-private split is very different in local DTT television. Both in regional and local broadcasting coverage, we have governments that have either chosen a strong presence in the private sector or that have preferred to create a strong public sector; from autonomous communities that do not subject public bodies to private competition, to those that are only now granting municipal licences. Undoubtedly this depends on their ideological stance concerning the role of direct public management in communication, because it's surprising that the communities that are most protective of their public media are governed (at least in their decision-making) by centre-left groups, while the tendency to reduce public activity appears to be more characteristic of administrations managed by the liberal-conservative right. More attention must be paid to this aspect in future research. It seems certain that the widespread cuts in public spending, which Spain will face in coming years, will determine the evolution of this phenomenon and the development of public forms of communication, particularly those dependent on councils.

Finally one cannot forget the stabilisation of the local broadcasting system, which is occurring within a context of a sharp

Table 3. Summary of licences awarded (May 2010)

	Regional public entity (year, terrestrial channels)	Private regional holders (number of channels)	Number of local private licences given	Number of municipal licences given	Total
Andalusia	RTVA (1989) (3)	Prisa* (1) Vocento (1) Prensa Ibérica (1) Joly (1)	157	28	192
Aragon	RTVA (2006) (2)	0	22	4	28
Asturias	RTPA (2005) (3)	Prisa* (1)	21	0	25
Canary Islands	RTVC (1999) (2)	Popular TV (1) Antena 3 Canarias (1)	32 (TDT-L) 14 (TDT-L)	3 (TDT-L) 5 (TDT-L)	58
Cantabria	0	0	0	0	0
Castile-La Mancha	RTVCLM (2001) (2)	Green PyM (1) La Regional (1) Radio, Prensa y TV (1)	72	0	77
Castile and Leon	-	RTVCyL (2)	-	-	2
Catalonia	CCRTV (1984) (5)	Emissions Digitals de Catalunya (4)	50	35	94
Community of Madrid	RTVAM (1984) (3)	Vocento (1)	30	1	35
Extremadura	CEXMA (2004) (1)	Prisa* (1) Kiss (1)	24	-	27
Galicia	CGRTV (1984) (2)	Popular TV (1) Voz de Galicia (1)	40	-	44
Balearic Islands	RTVIB (2005) (1)	Unedisa (1) TV Digital Balears (1)	28 locals 6 insulars	3	40
Rioja	-	Vocento (2) Popular TV (2)	-	-	4
Navarra	-	Canal4 (2) Canal6 (2)	5	-	9
Basque Country	EITB (1982) (4)	0	58	1	63
Murcia	RTRM (2005) (2)	Televisión Murciana (1) La Verdad (1) Popular TV (1)	24	8	37
Total	30	33	28	697	788

Source: Own about data from regional communities' official bulletins.

fall in advertising revenue in Spain, and which will condition (and is already doing so) the strategies of private players in local television business. More dangerous still are audience measurement tools with which advertising investment decisions are made in Spain, and which do not seem to be ready to include local providers, only regional ones. It's not only a question of the need for larger autonomous samples to provide statistically representative disaggregated figures, but also about audio-matching techniques used by Kantar Media (until now known as TN Sofres AM) to identify content in DTT broadcasts, which are not applied to local broadcasts. Even though this is not the aim of this work, suffice to say that there are serious

problems posed by Kantar Media's figures regarding local television stations in the last two years and, most particularly, after the digital switchover. Without the possibility of offering audience figures, at least aggregate, it will be difficult for local television stations to access the advertising market at such a delicate time.

Notes

- 1 See especially the statements by the Unión de Televisiones Comerciales Asociadas (UTECA) in recent years, at www.uteca.com.
- 2 The Spanish government presented its bill to regulate the regional television public service in December 1997, discussed in parliament during the months of March and April, 1998. The lack of a significant majority to approve this bill and opposition from parliamentary groups made the bill obsolete in 2000.
- 3 The newspaper *La Opinión de Tenerife* (Prensa Ibérica) filed an administrative appeal against various awards that the Superior Justice accepted. The Canary Islands government resorted to the Supreme Court, which has, to date, still not passed a ruling.
- 4 Something similar could happen with Castile-La Mancha's private regional licence holder for the third channel, La Regional, which is jointly owned by several companies that have received numerous local licences.
- 5 In the words of the CAC president Ramon Font, "the plan was for 96 local channels in Catalonia, and we broadcast 45: 34 private and 11 public. Of those that have returned their licences, the Planeta group, three from Localia (Prisa) and another from the Vocento group in Barcelona stand out, where two local frequencies are empty" (*El Periódico de Catalunya*, 30/01/2010).
- 6 The same day, the Supreme Court in Madrid decided on various appeals regarding these licences, although the appeal that managed to annul the tender was the one brought by Localia TV Madrid, SA, Comunicación y Medios Audiovisuales Tele Alcalá, SL, Productora Digital de Medios Audiovisuales, SA and Telenoroeste, SL.
- 7 This was included in the Senate after it was proposed by the following parliamentary groups: Socialists, Catalan Understanding of Progress (GPECP), Nationalist Basque Senators (GPSNV), Catalan CiU in the Senate (GPCIU), Senators of the Canary Island Coalition (GPCC) and Mixed (GPMX).

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