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How television failed to integrate Europe

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Introduction

Coming from a country (México) where television consumption is as important as to name entire generations after *telenovela* characters, it was fascinating to see how different the role television plays in Europe. The place that television has in society varies in every culture,

1) For Americans, television is mostly entertainment.

2) For Europeans, the medium that held the functions of cultivating, informing and entertaining, has experienced an evolution through which, television has increasingly become a source of entertainment¹.

3) Finally for Eurocrates, television is considered a powerful device of control.

This journey began with the conviction that television was a powerful political tool; therefore why not consider it to be capable of playing a role in Europe's integration? After a few months of research the departing hypothesis was proved to be wrong.

A number of factors such as:

- Europe's cultural diversity
 - The continent's linguistic fragmentation
 - The deficient structure of the European audiovisual market;
- constitute essential elements of the equation.

In the decade of the Eighties the European Commission (EC) undertook the mission to achieve a deeper European integration via the use of the audiovisual. In order to succeed this cultural mission, it was imperative to construct a more competitive European audiovisual market. This mission to *integrate Europe* and awake the Europeanness that lies within every European citizen has shaped the audiovisual policies of the European Union (EU); unfortunately, these policies are marked by a top-down voluntaristic approach.

¹ To prove it, just zap between French, German, Italian private channels and you will see what a spectacle it is. This claim evidently excludes minority highbrow pan-European channels like Arte, TV5, etc.

The objective of this dissertation is to explore the reasons behind the European Commission's failed strategy to integrate Europe through television. This analysis contrasts on the one hand, the vision eurocrates had in the 1980s of the role television could play, and on the other hand, the real effect (if any) of audiovisual production on Europeans. There exists a profound anachronism between the EU's chimerical vision of television as a unifying force and what actually takes place in the audiovisual market.

This dissertation is divided into six main chapters, the first is consecrated to a brief exploration of the role television can play in achieving a deeper European integration. The second will explore the resistance of national preferences to European television. The third is reserved for the causes and effects of American supremacy in the European audiovisual market. The fourth will analyze the construction of pan-European television based on a negative definition *vis à vis* the United States of America. The pen-ultimate chapter is dedicated to an overview of the European television market; the naissance of pan-European television, a balance of the current situation, and the difficulties of creating pan-European television. The final chapter proposes a non exhaustive review of television regulation, produced by the European Commission (EC), an interpretation of its motivations and its effects on the market.

This subject is profound and challenging, and even if the present exercise does not have the pretension of being exhaustive, it reposes on solid basis and provides answers to complex issues.

FIRST CHAPTER

The integration of Europe and the role of television

After the numerous recent cultural and social conflicts that seem to cry out the failure of the multicultural state, a common European identity seems more unattainable than ever. In the last three years the European project has reduced its speed dramatically. Gone are the days in which we spoke of a Constitution for the citizens of Europe, now national pro-Europe political elites fight for the mere survival of the project.

For decades it was assumed that economical integration would lead almost effortlessly to a political integration, the so called ever-closer union. At present, after 50 years of European construction we realize that political integration will not come easily, not to speak of cultural integration. Today, the European construction faces an unprecedented impasse. We can ask ourselves, what represents a deeper European integration? An undefinable European identity? Is this identity realizable or even desirable? When we speak about European identity, are we referring to a common identity or a mosaic of different cultures?

To start the analysis let us attempt to define European identity. According to Alberto Melucci, the constitutive features of a collective identity are:

The construction and reconstruction of a sense of themselves by self-identifying communities, using the signs provided by their cultures.

- A process of inclusion and exclusion: *We* are defined in part at least, as being different from how *They* are.
- The above process extends through time, involving both memory and amnesia, so the role of versions of history becomes crucial to the self understanding of a collectivity.
- The same process also extends in space².

² Alberto MELUCCI, «Nomads of the present: Social movements and individual needs in contemporary society», in Philip SCHLESINGER,

A fifth constitutive feature of a collective identity could also be added: shared symbols and invented traditions.

According to Phillip Schlesinger, this definition poses a dilemma; «Europeanness would be especially problematic because it has to emerge from an extensive history of highly conflictual collective identities»³. We can go even further and demand ourselves: if the past is crucial for the development of a common future, how are Europeans to conciliate a troubled past where nearly all nations in the continent have been confronted militarily? Europe's haunted history⁴ constitutes an immense stone on the road towards the construction of a collective identity. For Anthony D. Smith, «the abstract quality of a supposed European identity is, of course, no accident. To impart warmth and life to that identity would mean dredging up memories best left alone»⁵. Along this thought Ernest Renan's theory affirms that «forgetting is as important to the nation as remembering. Selective memory, and a quantity of amnesia, is essential for the survival of nations»⁶. If Europe's memory is haunted, if its peoples share the painful reminders of a nationally divided past, how can they unite around common myths and symbols that would drive them towards a deeper solidarity? Where shall Europe look for its myths and symbols?

The very concept of a 'common European identity' lacks realism, it is unrealizable and would probably end up being a reflection of big countries' culture in detriment of small countries' culture.

«Wishful thinking: cultural politics, media, and collective identities in Europe», *Journal of Communication*, Vol. 42, No 2, spring 1993, p. 7.

³ Philip SCHLESINGER, «Wishful thinking: cultural politics, media, and collective identities in Europe», *op. cit.*, p. 7.

⁴ Anthony D. SMITH, *Nations and nationalism in a global era*, Cambridge, Polity Press, 1995, p. 133.

⁵ *Ibid.*, p. 132.

⁶ Ernest RENAN, *Qu'est-ce qu'une nation ?*, Paris, Bordas, 1991, (1st edition 1882), p. 242.

In a more normative approach, we can define European culture as a set of principles that would enable Europeans to live under «democratic forms that permit and guarantee the coexistence of different faiths, cultures and ethnicities in conditions of mutual respect»⁷. In simpler words: *unity in diversity*, a regime of free flow of ideas, words and images, where multiculturalism could play an important role.

In 1973, the leaders of the (then nine) member states of the European Community signed the «Declaration of the European Identity». This statement proclaimed that member states share «the same attitudes to life, based on the determination to build a society which measures up to the needs of the individual, founded upon the cherished values of their legal, political and moral order [...] (and) the rich variety of their national cultures [...] determined (the nine) to defend the principles of representative democracy, the rule of law, social justice, (the ultimate goal of economic progress) [...] and respect for human rights»⁸.

This last definition shapes the majority of the discourses of the EU's institutions; cultural diversity constitutes one of the founding principles of the European construction. According to Habermas, we can continue to be attached to a national culture and adhere rationally to a European civic culture, in something that can be called *patriotisme constitutionnel*. But how strong is this identity? Are we overlooking the emotional part of the attachment to an identity? To participate actively in politics, citizens must have the desire to participate and must be passionate about the construction of their polity. According to Cris Shore, «une culture civique européenne ne peut naître qu'en préservant, au préalable, les différences culturelles (par le renforcement des droits culturels). Ainsi, paradoxalement, on ne

⁷ Philip SCHLESINGER, « "Europeaness"—A new cultural battlefield?», in Ronald J., POHORYLES, (ed. by), *European Transformations: Five Decisive Years at the Turn of the Century*, Sydney, Avebury Aldershot, 1994, p. 33.

⁸ European Navigator, « Document on The European Identity published by the Nine Foreign Ministers on 14 December 1973, in Copenhagen », available at: <http://www.ena.lu/mce.cfm>, consulted on February 2006.

pourrait voir l'identité politique se détacher l'une de l'autre qu'à la condition de protéger efficacement la première»⁹. The protection of the European identity in all its diversity is considered crucial for the legitimization of the European project.

In spite the fact that the decade of the Eighties brought significant advances for the European construction, a democratic deficit became obvious in the European elections of 1979. Television became a privileged instrument for the European Commission to help divert loyalties of member states' citizens towards the EU. According to Phillip Schlesinger, «the European integration had always had its primary conditions in the creation of a market; [...] now, cultural goods—which, of course, have a dual symbolic and economic nature—were brought into the equation»¹⁰. During the decade of the Eighties, a change of paradigm occurred. At the époque, it was believed that *political socialization* in the context of the EU needed to be understood as socially grounded, in the level of everyday life, rather than at the level of administrative social engineering¹¹. This idea lead communitarian decision makers to believe that a causal connection existed between the workings of mass media and the creation of a European identity; [...] and that the transmission and consumption of television programmes was held to be identity-conferring¹².

⁹ Eric DACHEUX, *L'Europe qui se construit : Réflexions sur l'espace public européen*, Saint Etienne, Publications de l'Université de Saint Etienne, 2004, p. 111.

¹⁰ Philip SCHLESINGER, «Changing spaces of political communication: the case of the European Union», *Political Communication*, Vol. 16, 1993, p. 263.

¹¹ Peter DAHLGREN, «Identity formation and the EU citizens: democratic dilemmas and media conditions », *15th Nordic Conference on Media and Communication Research*, Reykjavik, Iceland, Aug 2001, p. 1. <http://www.nordicom.gu.se/mr/iceland/papers/one/PDahlgren.doc> Consulted on January 2005.

¹² Philip SCHLESINGER, «Wishful thinking: cultural politics, media, and collective identities in Europe», *op. cit.*, p. 10.

In 1982, the first European television satellite was launched and the European Parliament passed its first resolution on television: the «Resolution on radio and television broadcasting in the European Community» (the Hahn Report)¹³. In this report, the European Parliament welcomed satellite television, and recognizes it as a useful instrument to encourage a deeper integration, towards: *the ever closer union* promoted by the Treaty of Rome. Satellite television was also considered a threat to the European construction if uncontrolled¹⁴.

The report stated: «Information is a decisive, perhaps the most decisive factor in European integration¹⁵, [...] the instruments which serve to shape public opinion today are the media. Of these, television, as an audiovisual means of communication is the most important»¹⁶.

The Hahn Report proposed the regulation of European broadcasting in order to serve the best interests of the European construction. It also asserted that «European unification will only be achieved if Europeans want it. Europeans will only want it if there is such a thing as a European identity. A European identity will only develop if Europeans are adequately informed. At present, information via the mass media is controlled at the national level»¹⁷.

The debut of what Phillip Schlesinger calls *the fallacy of distribution* was born, «it has been assumed in official circles that it might be possible to create a common culture through

¹³ European Parliament, Working papers, «On radio and television broadcasting in the European Community», Rapporteur: W. Hahn, 1982.

¹⁴ Richard COLLINS, « Reflections across the Atlantic: Contrasts and complementarities in broadcasting policy in Canada and the European Community in the 1990s », *Canadian Journal of Communication*, Vol. 20, No 4, 1995.

<http://info.wlu.ca/~wwwpress/jrls/cjc/BackIssues/20.4/collins.html>, consulted on January 2006.

¹⁵ European Parliament, Working papers, «On radio and television broadcasting in the European Community», *op. cit.*, p. 8.

¹⁶ *Ibid.*

¹⁷ *Ibid.*

television and cinema production and consumption»¹⁸. The directive of Television Without Frontiers was created as a result of this idea; the audiovisual sector would serve as a means to achieve a European integration.

In spite of being the principal vehicle for cultural values in modern society, a decade later (in the early Nineties), it was evident that television was not a magic formula that could integrate Europe and make member states' citizens participate in the European construction.

This analysis will try to unveil the reasons for the failure of the mission that the European Commission embraced: achieve a deeper European integration through television, and the construction of a more competitive audiovisual market. For the moment, all that can be said is, identities can not be decreed. They are born from a common past and above all from the desire to construct a future together, not from audiovisual bombardment. In Europe, two European televisions are possible: one is a Brussels's instrument of the European construction, and the other is a *free* expression of the continent's diversity¹⁹.

¹⁸ Philip SCHLESINGER, «Wishful thinking: cultural politics, media, and collective identities in Europe», *op. cit.*, p. 11.

¹⁹ Pascal MARCHETTI, *La production d'oeuvres audiovisuelles dans l'Union Européenne*, Paris, Economica, 1997, p. 105.

SECOND CHAPTER

The resistance of national preferences to European television

For decades the cold war maintained a terror-based stability; European identity was simple to define between the East and the West sides of the wall. During this historic period, it was natural for Western European countries to be united against a common threat, Communism. According to Philip Schlesinger, even if West-East were «political categorizations, they also functioned as articulated, symbolic forms that expressed cultural differences rooted in a wide range of divergent social, economic, political and ideological practices»²⁰. After the collapse of the Berlin wall, existent cultural diversity in Europe resurfaced.

As the Union deepens and economical and physical frontiers are wiped out, the very concept of the nation, intimately linked with frontiers becomes jeopardized. As a result, national communities tend to reinforce their identities on symbolic and national circumscriptions. One could then ask, is there a psychological need for frontiers? Some experts assert that «nations and nationalisms are necessary, if unpalatable, instruments for controlling the destructive effects of massive social change; they provide the only large-scale and powerful communities and belief systems that can secure a minimum of social cohesion, order and meaning in a disruptive and alienating world»²¹.

Even if slowly, the media industry reshapes itself to become more international, and its financial integration is today a reality, transnational and pan-European channels still face fierce competition from national television networks. At a

²⁰ Philip SCHLESINGER, «Europe's contradictory communicative space», *DAEDALUS, Journal of the American Academy of arts and sciences, Europe through a glass darkly*, Vol. 123, No 2, spring 1994, p. 26.

²¹ Anthony SMITH, *Nations and nationalisms in a global era*, Cambridge, Polity Press, 1995, p. 4.

consumption level, Europeans continue to overwhelmingly prefer national television. When watching television, the Public seeks proximity and international news can be perceived as irrelevant.

In a further chapter, it will be demonstrated how European actuality not only continues to be tributary of national networks, but how European news are given very little air time at a national level. It will also be demonstrated that there exist multiple reasons that explain the apparent lack of interest of national media on the European actuality.

National Publics seem to desire proximity on news coverage; but how is this affecting the European integration process? Do medias reflect a general trend that seeks to valorise proximity over international/European coverage? Or perhaps medias are, along with a part of the political class, the arrowhead of a resistance against a European construction that dissolves nations into a more diffuse supranational entity?

The principle of proximity dominates today's media coverage

Contrary to what could have been expected, technological advances that revolutioned communication in the 20th century did not result in a homogenization of television preferences. In an attitude of technologic determinism, it was believed that satellite would reshape the way Europeans (and the world) watched television; an alleged global culture would emerge and the new era of pan-European television would begin. However, a number of experts were mistaken, underestimating Europe's deeply rooted cultural diversity. Today « *la consommation de produits audiovisuels en Europe demeure encore une expérience essentiellement nationale* »²².

²² Jean K. CHALABY, « L'adaptation des programmes *européens* aux marchés nationaux, l'exemple d'Eurosport en Grande-Bretagne », in Dominique MARCHETTI, (sous la dir. de.), *En quête d'Europe : Médias*

After the fall of the Soviet regime, as the East block dissolved, the imminent international threat of a third world war disappeared. Western European Publics became somehow less concerned about international news and the area of interest of European publics was reduced to more proximate borders. One can go even further and affirm that the quest for proximity has become a rule; medias have been taken hostage of the hegemony of the principle of proximity. Even the media of small countries like Switzerland that were very open to the rest of the world, are increasingly dedicated to a more proximate coverage of the news. Another phenomenon that influences news coverage is the accrued interest on *people* press. Celebrity's coverage is gaining terrain on medias that were once considered as *serious*. Both phenomena work against the interest of a better European integration. Nations and sub-national regions close themselves to the world and lose interest on international affairs.

Sub-national regions and pan-European television

Pan-European television networks that were launched in the Nineties did not homogenize European publics. Instead of favouring the creation of a European public space, they stimulated the resurgence of stateless nations. Ethnic and especially linguistic communities (like the Basque country and Catalonia) have capitalized the advent of satellite television as means to reinforce and legitimize their uniqueness. Even if nationalisms in the end of the Nineties and the beginning of the 21st century cannot be compared in intensity to the nationalisms of the thirties and forties, sub-national regional medias are used today as vehicles of a revival of stateless nations.

et médiatisation de l'Europe, Paris, Presses Universitaires Rennes, 2004, p. 231.

National preferences & television

Today, national characters in Europe are more open and flexible. In the case of small European countries, we can assert that they are more open to the world, more inclined to question outbursts of nationalism because they have always been on the shadow of a big-brother (Germany for Austria and German speaking Switzerland, France for Belgium). Nevertheless it is a fact that lately, we have witnessed a revival of right-wing populisms that are opposed to a more profound European integration.

As a matter of fact, economic integration did not bring political nor cultural integration. Europeans constructed a single market but did not abandon their cultural heritage. A pool of sovereignties should not be mistaken for amalgamating identities or fusing cultures²³. This means that national preferences have not lost any of its anchorage among their respective publics. It should not surprise us, if national mental frames are giving a good battle in the audiovisual sector; which characterizes by being not purely rational, but highly conditioned by cultural and emotional factors.

Experts agree in saying that successful prime-time programme are almost invariably nationally produced, or at least produced by a neighbour country that shares the same mother tongue. Some examples of small but meaningful details that make a difference, and that national spectators appreciate in fictional programmes are: police patrol vehicles characteristic of a country or a city, police, fire fighters and rescue team uniforms, or even local landmarks. Some countries though, take it a little further. In the case of Spain, the American sit-com *Friends* is dubbed, but when a character mentions the name of a celebrity widely known in American culture, the Spanish translation changes the name and makes reference to a Spanish character that could hold the same meaning; so instead of

²³ Anthony SMITH, *Nations and nationalisms in a global era*, *op. cit.*, p. 125.

hearing Rod Stewart, the Spanish viewer would hear Julio Iglesias. The fact that television series that are as well known and as warmly accepted by spectators as *Friends* need this type of adaptation, tells us something important about television consumption in Europe: we can affirm that «*les contenus médiatiques son empreints de marqueurs culturels qui leur confèrent une saveur particulière dont sont friands les publics qui s'y reconnaissent*»²⁴.

National information channels

The case of information channels is different. Transnational information channels require even more intervention and local adaptations than fiction²⁵. When choosing a day-time or evening news programme, publics search above everything, local relevance and proximity. According to the European Culture Foundation, the public appreciates when news is explained by known journalists, that share their preoccupations and their environment²⁶. Some experts assert that watching evening news constitutes a ceremony, a ritual, where everybody realizes the collective character of the behaviour. Peter Larsen affirms that «*regarder un journal télévisé, c'est affirmer sa position comme membre de la communauté nationale*»²⁷. There exist two conditions of a more practical nature that can explain the resilience of national information channels: 1) the fact that political references are national, and; 2) the (supposed) homogeneity of the national public.

²⁴ François HEINDERYCKX, « L'Europe comme espace médiatique », *MédiaMorphoses*, Vol. 3, No 12, 2004, p. 81.

²⁵ François HEINDERYCKX, *L'Europe des Médias*, Bruxelles, Ed. de l'Université de Bruxelles, 1998, p. 209.

²⁶ *Ibid*, p. 37.

²⁷ Peter LARSEN, « More than just images : the whole picture. News in the multi-channel universe », in François HEINDERYCKX, *L'Europe comme espace médiatique*, *op. cit.*, p. 228.

Phillip Schlesinger supports this idea by acknowledging the crucial function of television in national political culture: «the last redoubt of national originality is the national nightly news, devoted in the first instance to the doings of national political figures in the universally accepted ethnocentric manner»²⁸. National evening news constitutes a strong barrier between pan-European information channels and the European Public. According to Dominique Marchetti, «la plupart des chaînes nationales grand public en Europe de l'ouest, ont réduit considérablement la part accordée à l'actualité étrangère dans leurs journaux d'information»²⁹. Is this defiance of national medias towards the international and European news coverage a reflection of the public preferences, or part of a resistance movement against European integration? Given the fact that successful transnational news channels are elitist channels that target the up-market consumer (the top 20 percent of the population with the highest revenues); It can be deduced that the majority of national publics are not very concerned with international reports, unless the information has a relation with national interests. Most international coverage requires a high culture capital, which is not found in the mass of national publics.

According to a study made by Guillaume Garcia and Virginie Le Torrec for the University of Paris IX (CREDEP)³⁰; national television channels organize their information in such a way that is susceptible to activate a negative perception of the EU. National newsrooms decide frequently not to open an office in Brussels, but then impose their vision of the EU to independent journalists that cover for them. «A national and intergovernmental angle has to be respected; Brussels' coverage is typically limited to the most visible and powerful EU

²⁸ Phillip SCHLESINGER, *Media, state and nation: political violence and collective identities*, London, Sage, 1991, p. 161.

²⁹ Dominique MARCHETTI, « L'internationale des images », *ACTES*, No 145, 2002, p. 72.

³⁰ Based on five countries: Germany, France, Italy, Netherlands, and the United Kingdom.

institutions, which tend to be the most technocratic ones»³¹. Guillaume Garcia and Virginie Le Torrec denounce that the democratic and supranational elements are almost absent in the coverage of the EU; institutions like the Committee of the Regions, the European Parliament, or the European Parliamentary groups who represent a good example of embryos of an authentic European democracy are not present in national media coverage. Phillip Schlesinger agrees and goes further affirming that national news still generally speak with an institutional, public service voice and have the signal advantage of addressing a bounded community³².

But behind this apparent defiance of national medias towards the EU, lies the true reason for the disinterest of the European publics in regards to the EU. European citizens have not been politically socialized in the EU's system of norms. The absence of what Garcia and Le Torrec call *justifiabilité normative*, which is: «*la reconnaissance partagée d'une communauté de référence, normes et procédures réalisés en termes de politiques publiques*»³³. We should also take into account the fact that political classes face a legitimacy crisis at national levels.

Citizens around the world feel disenchanting by political elites, and the lack of political participation becomes more a norm than an exception. To this global trend, in the specific case of the EU we are compelled to also consider the variable of the cognitive dissonance between national political systems and institutions of the EU. Moreover, national political frames are reactivated everyday by national evening news. Even if languid, the exercise of citizenship continues to take place in the State that still holds the pre-eminent locus and focus of collective

³¹ Guillaume GARCIA, Virginie LE TORREC, « L'Union européenne, saisie par l'information télévisée », *MédiaMorphoses*, Vol. 3, No 12, 2004, p. 51.

³² Philip SCHLESINGER, « Tensions in the Construction of European Media Policies », in Nancy MORRIS, Silvio WASIBORD (ed. by), *Media and Globalization, Why the State Matters*, Maryland, Rowman & Littlefield Publishers, Inc., 2001, p. 112.

³³ *Ibid.*, p. 54.

identity³⁴. It should not be a surprise if the EU political system seems to Europeans more as an esoteric ensemble than a legitimate political apparatus.

The need for localization

The preference shown to national fiction and national news coverage is deeply rooted in European publics. The task of transnational channels is not easy. After decades of trying to conquer the European public with a homogenized proposal, the biggest and most successful companies (that survived the infancy of satellite television), discovered that to succeed, they were obliged to localize their products.

Localization

Until 1990, pan-European channels like MTV, CNN and Eurosport pursued a global strategy in the European market. At the beginning of the decade, it was clear that this global approach had its limitations. With the success experienced by the first pan-European theme channels, they attracted competition from national networks. MTV and CNN were the first to confront rivals from national channels. Several national information channels began to transmit 24 hours and national musical channels appeared throughout Europe.

Music Television Channel (MTV)

Some of MTV's challengers were: VIVA in Germany, MTF in the Netherlands, Video Music and TMC2 in Italy, M6 in France,

³⁴ Philip SCHLESINGER, « Tensions in the Construction of European Media Policies », *op. cit.*, p. 95.

and other channels in Scandinavia³⁵. These channels had several advantages over MTV. They spoke the language of the country in which they were based. MTV broadcasted mostly American artists with English-only speaking presenters, alleging that the majority of young Europeans spoke English; top executives failed to fully acknowledge linguistic and cultural diversity. Furthermore, musical tastes were not uniform throughout Europe; new national musical channels offered nationally known artists, with play lists adapted to local taste. After being confronted with the limits of its global strategy, MTV understood the need to adapt to survive.

Through a costly localizing strategy that started in 1995, MTV created several channels in the aim to adapt its product to national and/or linguistic areas. Milan was the first city to host a nationally successful adaptation of MTV. With local staff and a great choice of national and international artist, MTV achieved an efficacious combination between local and global. After its success in Italy, MTV followed the same adaptation strategy with MTV North that initially covered Scandinavia, the UK, Benelux, France, Spain, Greece and Portugal. MTV Central covered Germany, Schweiz and Austria. In 1997 a special version was created for the UK and Ireland: MTV UK. MTV North was divided into MTV Nordic and MTV European, which covered the rest of Europe. In the year 2000 pursued a more in depth localization; MTV Poland, MTV Spain, MTV France and MTV NL were created³⁶. According to Jean K. Chalaby, «MTV is today the most localized pan-European network, having launched six country-specific and two region-specific channels (MTV Central and MTV Nordic) »³⁷.

The following table shows the percentage of music genre on four MTV devolved channels.

³⁵ Jean K. CHALABY, «Transnational television in Europe, the role of pan-European channels», *European Journal of Communication*, Vol. 17, No 2, 2002, p. 196.

³⁶ *Ibid.*, p. 196.

³⁷ *Ibid.*

Table 1: Percentage of music genre on four MTV channels

Percentage of music genre on four MTV devolved channels				
	<i>MTV UK</i>	<i>MTV Nordic</i>	<i>MTV Central</i>	<i>MTV Italy</i>
Mainstream pop	33.5	38.6	14.7	45.7
Rock	23.8	12.7	9.9	17.3
Black music	33.0	29.4	63.7	11.7
Dance	8.1	18.3	11.4	18.8
Other	1.6	1.0	0.4	6.6

Source: Roe and De Meyer (2000:153), in Jean CHALABY, "Transnational television in Europe, the role of pan-European channels", *European Journal of Communication*, Vol 17 (2): 183-203, 2002, p. 197.

Table 1 shows how different MTV channels have become depending on its geographical/linguistic localization. This can be explained by the fierce competition that MTV has encountered from national networks. At present there exist 140 music channels³⁸ that broadcast in competition with the American music channel, which logically forces it to adapt to local tastes.

Among the localization strategies that MTV put into practice are: shows produced locally and presented by local VJ's. Recently, local acts constituted around 60 percent of existing play lists³⁹. But in spite of a costly localization process, MTV has made important efforts to keep its international glare. One of the advantages that MTV holds against its national competitors is the fact that they offer American stars the possibility to concede interviews to as many channels in the network as they consider necessary without leaving the MTV studios in London⁴⁰.

³⁸ *Ibid.*, p. 197.

³⁹ Jean K. CHALABY, « Television for a new global order, Transnational television networks and the formation of global systems», *Gazette: The international journal for communication studies*, Vol. 65, No 5, 2003, p. 465.

⁴⁰ *Ibid.*, p. 466.

As the European single market and globalization continues to advance in all economic sectors, companies develop new products that are increasingly adapted to a pan-European market. These companies require a vehicle to reach young generations and attain a wider definition of a *European consumer*. In the aim to reach a more ample audience and avoid national advertising regulations (which can vary according to domestic definitions of nudity, profane language, explicit scenes, etc), transnational companies continue to increase their business with pan-European channel networks. This has been understood by MTV, who has never renounced the global advantages that its products represent. It has been asserted by Jean K. Chalaby that localization in the case of MTV is part of a global strategy. «Localization is not about turning an international channel into a local one»⁴¹, and most importantly, «localization accelerates the process of globalization, notably because it allows global players to operate in a multinational environment»⁴².

Cable News Network (CNN) and its subdivision strategy

As we have seen with the example of MTV, as certain niche markets matured (like news and music), national television channels began eating into the audience share of CNN and MTV⁴³. Some of the projects that big European countries launched to counter CNN were: Sky News in the United Kingdom in 1989, N-TV in Germany in 1992, LCI in France, *Tele-Noticias* in Spain and later BBC News 24, which made of the UK the first country in Europe to have two 24 hour news channels. Even in smaller markets like Switzerland, Suisse 4 was created for the *Suisse Romande*⁴⁴. In June 1997, as part of a special

⁴¹ Jean K. CHALABY, «Transnational television in Europe, the role of pan-European channels», *op. cit.*, p. 199.

⁴² *Ibid.*

⁴³ Jean K. CHALABY, *Transnational television worldwide: towards a new media order*, London, I. B. Tauris, 2005, p. 54.

⁴⁴ François HEINDERYCKX, *L'Europe des Medias*, *op. cit.*, p. 219.

segment destined to Germany, CNN broadcasted for the first time in a language other than English.

As part of its strategy, CNN subdivided into six different channels: North America, Europe, Middle East/Africa, Asia Pacific, south Asia and Latin America⁴⁵. Even if CNN does not go as far as MTV in terms of the degree of localization, «at least half the weekly output of localized feeds are produced locally»⁴⁶.

With offices all over the world, CNN along with BBC World hold two of the strongest positions in news broadcasting in Europe and the rest of the world. Both channels cooperate with national networks, but CNN is the only one to invest locally. In Spain Canal Plus España created CNN+ in 1999, with N-TV in Germany and with Turkey's Dogan Media Group created CNN Türk⁴⁷. As we have asserted, news broadcasting requires more adaptation than fiction. CNN's subdivision strategy was crucial to maintain its leadership. Ancestor of all 24 hour news broadcasting channels, CNN now proposes a product that is present in different markets. For its European public, CNN produces in London: World News Europe which is a journal of European headlines; CNN also produces Inside Europe, which is a weekly programme that analyses European current affairs.

In the case of CNN, what pushes the channel to invest in the international market and especially in Europe is the continent's inherent linguistic and cultural diversity. However, to attribute this important decision to cultural matters only would be to ignore important economic factors. Transnational and pan-European television should not be thought outside a broader (global) economic environment. The integration of media capitals in financial markets, mergers, and the globalization of exchanges, along with technological advances that facilitate broadcasting are the most powerful forces behind the ambition to localize. Localization accentuates the process of globalization.

⁴⁵ Jean K. CHALABY, « Television for a new global order, Transnational television networks and the formation of global systems», *op. cit.*, p. 467.

⁴⁶ *Ibid.*

⁴⁷ *Ibid.*

Localized channels are vehicles of global values and global economic interests; they allow and make possible the connection between national publics and global interests. In addition to this, they are at the origin of a more efficient market segmentation.

Eurosport

Eurosport is the most extensively available channel in Europe. It reaches over 95 million homes and 250 million viewers in 54 countries. Over 96 percent of Eurosport's viewers can watch their favourite sports in their native language⁴⁸. But how did Eurosport arrive to be able to satisfy an auditory as diverse as Europe? A localization strategy is at the heart of this transformation that enables 96 percent of the channel viewers to follow their favourite sports in their mother tongue.

Given the steady and growing importance of football in the UK and the harsh competition in the British market, Eurosport launched British Eurosport in January 1999⁴⁹. The channel changed to adapt to the British market, and like its slogan declares: «Sport, from a British perspective». A series of specific changes were implemented. The task was to give the channel a more familiar face and keep it away from the excessively European (and distant character) that characterized it previously. The logo and promos were changed, but the most important innovation was the production of its own sports journal (Sportcentres) in *plateaux* with live journalists⁵⁰. This constituted a significant advantage for British Eurosport, giving

⁴⁸ Eurosport's web page, available at: http://eurosport.co.uk/home/pages/v4/l2/s10000/sport_lng2_spo10000.shtml, consulted on February, 2006.

⁴⁹ Jean CHALABY, « L'adaptation des programmes européens aux marchés nationaux. L'exemple d'Eurosport en Grande-Bretagne », p. 237, in Dominique MARCHETTI (sous la dir. de), *En quête d'Europe : Médias et médiatisation de l'Europe*, Paris, Presses Universitaires Rennes, 2004.

⁵⁰ *Ibid.*

it a human face which is absent from other examples of adaptation such as EuroNews. The channel makes an effort to adapt sports news to a British perspective, covering for example a sportsman/sportswoman that made his/her debut in the English league or British players that have made it abroad.

The British Eurosport project became possible by a greater facility to exchange images and information. It should not be a surprise if the principal investors of British Eurosport are French⁵¹. Nevertheless it is important to mention that these economic globalizing processes have very little impact on the volume of inter-European cultural exchange. Even something as *universal* as football requires national adaptation. It has been said that today, football teams are a reflection of Europe's diversity, but it can also be assumed that economic factors are the force behind this interbreeding.

Other ways to localize

We have now seen some of the most important examples of successful localizations. But there are other methods of localization that require less investment. According to Jean K. Chalaby, localization can be also achieved by advertising windows, translation (dubbing or subtitling) and local programming⁵².

1. Advertising windows: advertising is run locally, offering the possibility of reaching different consumer segments at the same time.

2. Translation: Dubbing or subtitling. Here, the best illustrative examples are EuroNews and Arte. Even if they have a different production strategy (these two cases will be explored in further chapters), they recur to translation or sub-titling to adapt to different linguistic markets.

⁵¹ Jean CHALABY, «Transnational television in Europe, the role of pan-European channels», *op. cit.*, p. 241.

⁵² *Ibid.*, p. 193.

3. Local programming: illustration provided by the three pan-European networks examined previously: MTV, CNN and Eurosport. As seen, this approach requires far more investment and a greater knowledge of the market.

In the following table, shows the degree of localization in pan-European channels.

Table 2: Levels of localization in pan-European television channels

<i>Local advertising Windows</i>	<i>Local languages</i>	<i>Local programming services</i>	<i>Local opt-outs</i>
Boomberg	Arte, Bloomberg	Arte, Bloomberg	Eurosport, MTV
Cartoon Network	Cartoon Network	Cartoon Network	
CNBC, CNN Int	CNBC, CNN Int	CNBC, CNN Int	
Discovery	Discovery	Discovery	
Eurosport, Fox	Euronews	Eurosport, Fox	
Kids, MTV	Eurosport, Fox	Kids, MTV	
National Geographic	Kids, MTV	National Geographic	
Sky News	National Geographic	Universal Studios	
Universal Studios Networks, VH1	Universal Studios Networks	Networks, VH1	

Source: Jean CHALABY, "Trans-national television in Europe, the role of pan-European channels", *op. cit.*, p.193.

Even if satellite television and transnational channels have «challenged the enduring relationship between television and the nation-state by reaching audiences across frontiers»⁵³, television consumption remains shaped by national and local patterns. National political, sociological and cultural traits are intimately related to the attribution of relevance. Television in Europe is

⁵³ Jean K. CHALABY, « Television for a new global order, transnational television networks and the formation of global systems», *op. cit.*, p. 460.

marked in its essence by the territory that it covers. National television continues to be «à la fois un espace de protection et le lieu de passage obligé vers les autres (peuples d'Europe)»⁵⁴. Cultural differences, differences in lifestyle, prime-time, linguistic diversity and even definitions of nudity, explicit scenes, and regulatory frameworks, make of the old continent a market that demands localization. In addition, national publics demand news coverage to be locally relevant; simultaneously, the principle of proximity shapes national medias (the creation of fiction included).

Sub-national regions and news broadcasting in Europe

For a great part of the European public, European integration is perceived as a threat and not as an alternative form of identity. Often associated with globalization, the European project is opposed in essence, to national and ultimately sub-national regional identities. In this process that takes place nowadays and that Lereux and Teillet call «*La résurrection médiatique des terroirs*»⁵⁵, sub-national regions are perceived as genuine and legitimate keepers of values, traditions and what is considered to be authentic. People tend lately to define themselves as: Gallegos, Basques, Catalans, Romans, Bavarians, and Bretons. This phenomenon has a direct impact on news broadcasting at a national level.

Local news have existed since the Eighties, but the *résurrection médiatique des terroirs* adds a whole new dimension to regional broadcasting. We can define regional television as:

⁵⁴ Jean-Michel UTARD, « Des médias européens ? L'exemple d'Arte », *Médiamorphoses*, Vol. 3, No 12, 2004, p. 90.

⁵⁵ Pierre LEROUX et Philippe TEILLET, « L'Europe en creux, médias nationaux et territoires contre l'Europe », in Dominique MARCHETTI (sous la dir. de), *En quête d'Europe : Médias et médiatisation de l'Europe*, op. cit., p. 264.

«all form of programmes targeting a geographical audience of an infra-national level»⁵⁶.

The territorialization of news broadcasting can be considered as a response/resistance to a homogenization of identities due to the European unification process. Pierre Leroux and Philippe Teillet assert that «some of these regions have been annihilated by homogenizing and integration processes driven by national formations»⁵⁷. The desire to preserve cultural diversity can also be taken to the extreme. The birth of *cultural fundamentalism*, defined by Stolke as: «a post racist doctrine in which sacralized cultural difference replaces racial superiority as the ground for refusing pluralism»⁵⁸. This type of cultural separatism is also denounced by Musso, Souêtre and Levasseur, who try to make a clear distinction between «*cette identité haineuse, opposée à tout ce que qui est étranger, qui tend à se répandre comme une lèpre idéologique*»⁵⁹ and what they consider a legitimate way to preserve a cultural identity, identity that would be «*l'affirmation d'une personnalité indispensable dans tout dialogue*»⁶⁰. These two degrees of resistance have something in common, they refuse the fatalism of cultural assimilation at a European level.

Sub-national regions make it into marketing

Due to the cultural fragmentation that characterizes the European market, this new fascination over regions is creating a tendency towards a greater segmentation by market forces.

⁵⁶ European Media Observatory, available at: <http://www.obs.coe.int>, consulted on February 2006.

⁵⁷ Pierre LEROUX et Philippe TEILLET, « L'Europe en creux, médias nationaux et territoires contre l'Europe », *op. cit.*, p. 264.

⁵⁸ V. STOLKE, «Talking culture: New boundaries, new rhetorics of exclusion in Europe», in Phillip SCHLESINGER, «From cultural defense to political culture», *Media, Culture and Society*, Vol. 19, 1997, p. 369.

⁵⁹ Pierre MUSSO, (et al.), *Presse écrite et télévision dans les régions d'Europe*, Strasbourg, Editions du Conseil de l'Europe, 1995, p. 54.

⁶⁰ *Ibid.*

Recently, it can be noticed the creation of new series of products that conceive their marketing on the basis of traditions, exploiting their folkloric aspect. This tendency does not aim at the integration of these small communities into larger national conglomerates or in a greater extent Europe, but searches to value them by their isolation. But what makes a region capable of producing broadcasting powerful enough to be noticeable and generate its own marketing drive? For François Heinderyckx, two conditions are necessary. One is: « *le caractère commun doit être suffisamment marqué et engendrer des attentes et des motivations similaires dans l'ensemble des régions ciblées* »⁶¹. The other is: « *le groupe doit rassembler un auditoire potentiel dont la taille motive la création du support et dont les caractéristiques sont susceptibles d'intéresser suffisamment d'annonceurs* »⁶².

This regional segmentation works in the interest of the market and constitutes a strong globalization force. Regionalization of channels allows broadcasters to target publics in a broader territory but from a more constrained socio-economic and socio-demographic spectrum. Up-market consumers, for example are targeted by channels like Bloomberg and CNBC that offer financial information. Broadcasting into transnational regions that share a common (or vehicular) language, as well as social and cultural traits is facilitated by the increasing regionalization trend. Simultaneously, this regionalization trend is in harmony with the public's quest for proximity. Transnational companies that offer services to specific markets find in these channels an excellent vehicle to deliver their publicity to a more accurate segment of potential consumers.

⁶¹ François HEINDERYCKX, *L'Europe des medias*, Bruxelles, Ed. de l'Université de Bruxelles, 1998, p. 211

⁶² *Ibid.*

Regional news channels

In spite of technological advances such as the satellite (and the explosion in the number of channels that this technical innovation brought), the configuration of news broadcasting continues to be essentially framed by national and regional networks. Except in some relatively successful cases like EuroNews, CNN International and BBC World, it is widely accepted that people prefer to watch news in their mother tongue and through a national optic.

The best example to illustrate the regionalization of news broadcasting can be found in France. France 3 has always manifested a regional *call*, its news programmes are divided on administrative regions (like many other public broadcasters), in addition to *journaux télévisés*, France 3 offers the programme Thalassa, which after years of success continues to present documentaries with a maritime theme.

The *journal de 13 heures* from TF1 is also an excellent example and has been the object of the Pierre Leroux and Philippe Teillet's analysis on sub-national regional medias, titled: «*L'Europe en creux, médias nationaux et territoires contre l'Europe*». The authors affirm that due to audience imperatives, news broadcasting has been obliged to evolve away from classic formats «*soumettant le discours politique à la contrainte des lois du divertissement*»⁶³. This *journal* targets a conservative popular public; in it, one finds a portrait of *la France profonde*, where populism is semi caricaturized.

Other examples of this tendency towards the regionalization of news broadcasting and transnational collaboration are «*Mediterraneo*», a joint effort between Italy and Malta and; «*Regards voisins*», congregating France and Belgium TV. In the Basque region, medias are an important instrument in the

⁶³ Pierre LEROUX, Philippe TEILLET, «*L'Europe en creux, médias nationaux et territoires contre l'Europe*», *op. cit.*, p. 276.

defence of the language. An impressive half of the cultural budget of the region is destined to regional radio and television⁶⁴.

Do these tendencies towards the regionalization of news broadcasting constitute a European modern renaissance of the medias? In this development, we sense a dichotomy. In one side, the regionalization process is in harmony with the definition of Europe as: Unity in diversity; but on the other side, the antagonist position reserved for the European integration process as a dissolvent of what is authentic, leaves almost no place for reconciliation between Europe and its sub-national regions⁶⁵. It is important to mention that national medias are cautious to attach national identity to regions⁶⁶ and avoid the creation of what seems to be unnecessary divisions. This is clearly not the same attitude towards the EU, confronted with the media's euro-scepticism? It is here when we can question the alignment of national medias with the European cause. Are medias a reflection of the euro-scepticism that already lies within society? Or do they encourage it? It cannot be denied that television held an important role in the cultural process of linguistic unification of France and Italy; nevertheless, this demanded a centralized state-driven policy, mostly inexistent in Europe after the de-regularization process of the Eighties. Are regional revivals a reminiscence of never achieved national integrations? As we advance on the multicultural route, medias represent a window of opportunity to cultural regions that have been repressed or in the best cases ignored. Regions represent as well, an opportunity to more specialized transnational projects and multi-national companies that look for a more specific consumer targeting.

Even if ironically, the EU bases part of its legitimization on regional policies (through the Committee of the Regions and its

⁶⁴ Pierre MUSSO, (et al.), *Presse écrite et télévision dans les régions d'Europe*, *op. cit.*, p. 54.

⁶⁵ Except for regions like Catalonia, who see the EU as an opportunity to acquire more independency.

⁶⁶ Pierre LEROUX, Philippe TEILLET, « L'Europe en creux, médias nationaux et territoires contre l'Europe », *op. cit.*, p. 269.

Europe of Regions approach); these regions constitute a resistance against European domination and regulation. Contrary to what the EU and specially the Committee of the Regions could wish, we observe an extensive mediatization (by national and regional medias) of unpopular policies and the successive demonstrations against them (like the demonstrations of hunting clubs in the UK and France). In this specific case, we come across a clear example of the opposition made between sub-national regions and the EU; between locally and strongly anchored traditions, and technocracy. Leroux and Teillet denounce an artificial representation of the unequal battle between the *pot de fer* (national and supra-national governments, technocracy) and the *pot de terre* (local traditions, individual stories).

Europe's linguistic diversity and television's inclination towards specialization, leads us to predict a greater tendency towards the regionalization (sub-national and transnational) of news broadcasting. As it has been demonstrated, national and local mind-frames are here to stay. No supranational system will change in the mid term well anchored public preferences. People appreciate proximity; people like to be able to see their everyday problems making the news. Brussels, at least in the short term, will not connect easily to the average living room.

THIRD CHAPTER

American supremacy in the European audiovisual market

American productions are omnipresent on both the European and the world market. In spite of the diverse European policies that pursued the obstruction of American imports, Europe continues to be flooded with American television fiction. Several approaches have been taken throughout the years by political and cultural European elites. One of these approaches marked Communication Studies research and official thinking in the Seventies, the Eighties and reposed in the thesis of the cultural imperialism theory.

Cultural Imperialism

In his book «Communication and cultural domination», Herbert Schiller proposed in 1976 the term cultural imperialism «to describe and explain the way in which large multinational corporations (including the media), of developed countries dominated developing countries»⁶⁷. This theory denounced the domination of one nation over another, and a relationship where the flow of information would follow the pattern: north towards south. Rich and *centre* nations would export to *peripheral* or developing countries and as a result of this one-way flow of audiovisual exports, a relationship of dependency would be created. Peripheral countries would depend on centre countries leading to exert cultural domination over them. Two of the most

⁶⁷ Livingston WHITE, «Reconsidering cultural imperialism theory», *TBS Archives of Florida State University*, No 6, Spring-Summer, 2001, available at: www.tbsjournal.com/Archives/Spring01/white.html, consulted on April 2006.

important axioms of the cultural imperialism theory are: First, the assumption that «an active role on the part of the dominating country and a deleterious effect on the dominated one»⁶⁸; and second, «third world consumers of (foreign) media products will be influenced by the values inherent in that content, the values of an alien and predominantly capitalist system»⁶⁹. During the last two decades, these assumptions were confronted with empirical evidence by scholars like Liebes and Katz, in 1990 in their book «The exporting of meaning: Cross-cultural readings of Dallas». The cultural imperialist theory also assumed that *centre* exporters, in this case American companies, (organized in the Motion Picture Association of America), had as purpose the domination of the world through images.

Today it would be naïve to defend this approach. Scholars have identified various weaknesses of the theory and have changed the way communication research approaches this question. One of the weakness of the theory is the fact that «the economic component of media imperialism may be expressed in statistics, but the cultural component is much more difficult to measure»⁷⁰. Another flaw, denounced by Liebes & Katz, is that the theory «does not acknowledge an audience's ability to process information and interpret messages differently based on their individual background»⁷¹. The fact that the theory does not accord the proper importance to the independence of the audience is one of its major weaknesses. The theory places audiences on the same level as receptors that absorb information

⁶⁸ Sui-Nam LEE, «A case against the thesis of communication imperialism: The audience's response to foreign TV in Hong Kong. », in Livingston WHITE, «Reconsidering cultural imperialism theory», *op. cit.*

⁶⁹ C. OGAN, «Media imperialism and the video cassette recorder: The case of Turkey», in Livingston WHITE, «Reconsidering cultural imperialism theory», *op. cit.*

⁷⁰ T. LIEBES, E. KATZ, «The export of meaning: Cross-cultural readings of Dallas», in Livingston WHITE, «Reconsidering cultural imperialism theory», *op. cit.*

⁷¹ *Ibid.*

without opposing any resistance. If we have learned something from history, it is clear that we cannot underestimate the Public; even under the most solid dictatorships people preserved the capacity to separate propaganda from reality. An audience's reaction has been studied in the past by scholars like Ien Ang, who denounces in her book «Watching Dallas» the «stubborn fixation on the threat of American cultural imperialism»⁷², she also affirms that «worldwide audiences enjoyed Dallas for its melodramatic quality and were able to see through the obvious ideological connotations of the series»⁷³.

Another main fault of the theory was denounced by the Australian scholars Sinclair, Jacka, and Cunningham who assert that the theory «does not hold true in all situations of the phenomenon that it attempts to explain»⁷⁴. This weakness can be illustrated by practical examples that prove wrong the assumption on the media dominance of central countries over peripheral countries. According to Sinclair, Jacka, and Cunningham, television industries of countries considered as peripheral, such as Mexico, India, Brazil, Canada and Australia have developed strong television industries and a strong position among its national publics⁷⁵. The best example is Mexico, that in spite of sharing a frontier of more than a thousand kilometres (1100) with the powerful neighbour (USA) has successfully built up a television industry producing 78 percent of all its programming⁷⁶.

The cultural imperialism theory «was unable to produce an explanation for the complexity of world television and the

⁷² Ien ANG, *Watching Dallas, soap opera and the melodramatic imagination*, translated by Della COULING, in Livingston WHITE, «Reconsidering cultural imperialism theory », *op. cit.*

⁷³ *Ibid.*

⁷⁴ J. SINCLAIR, E. JACKA, S. CUNNINGHAM, (ed. by), « New patterns in global television: Peripheral vision », in Livingston WHITE, «Reconsidering cultural imperialism theory », *op. cit.*

⁷⁵ *Ibid.*

⁷⁶ *Ibid.*

consolidation of regional media markets in particular»⁷⁷, but again the Australian team formed by Sinclair, Jacka, and Cunningham, proposed an alternative theory that explains the consolidation of regional markets; «they proposed a regional perspective and fashioned the concept of *geolinguistic region* to give an account of the emergence of regional media players»⁷⁸.

‘Cultural proximity’, a concept developed by Straubhaar in 2000, in his paper «Cultural capital, language, and cultural proximity in the globalization of television», is in a much better position to explain the reality of today’s market. The cultural proximity concept states that «audiences will tend to prefer that programming which is closest or most proximate to their own culture: national programming if can be supported by the local economy»⁷⁹. Ultimately, what is crucial is the principle of *cultural proximity*, this principle is responsible for media industries dominating a specific market, and not necessarily *cultural imperialism*⁸⁰.

Today, in the *aube* of the 21st century, the world is more interconnected than ever, to speak of cultural imperialism would be too simplistic. Globalization is not a strategy created to deceive social-democracies or to impose economic fatalism; it is a reality that shapes every aspect of human life.

American hegemony in the European market

With a power as strong as the defence department of the USA, the Motion Picture Association of America is present with all its power in Europe. Since the early years of the 20th century

⁷⁷ Jean K. CHALABY, « American cultural primacy in a new media order, a European perspective », *The International Communication Gazette*, Vol. 68, No 1, 2006, p. 34.

⁷⁸ *Ibid.*

⁷⁹ J. D. STRAUBHAAR, « Cultural capital, language, and cultural proximity in the globalization of television », in Livingston WHITE, «Reconsidering cultural imperialism theory», *op. cit.*

⁸⁰ *Ibid.*

Hollywood majors dominate the film industry and recent changes in the television universe have only reinforced their grip on the old world's market.

Table 3. Number of entries by country of origin in three rankings of the top 40 audiovisual media companies.

	Screen Digest Jul-03	EAO 2003	Variety Sep. 2003
US	15	12	19
Japan	7	7	6
UK	5	7	5
Germany	4	5	2
France	3	3	2
Italy	2	2	1
Australia	1	2	1
Luxembourg	1	1	1
México	1	1	1
Canada	1	-	1
Sweden	-	-	1

Sources: Screen Digest (07-2003, p. 197); EAO (2003a, p. 32); Variety (Sep. 2003, pp. 15-21), in Jean K. CHALABY, « American cultural primacy in a new media order, a European perspective », *The International Communication Gazette*, Vol. 68, No 1, 2006, p. 37.

Today, among the world's Media heavy weights, US companies represent almost half of the total top 40 companies. Table 3 shows the world's distribution of media power in the world. According to Jean K. Chalaby, «The limited scope of European companies become apparent when their total revenue is compared to that of US media conglomerates for 2002/3: US\$76.5 billion against US\$ 225.5 billion»⁸¹. The biggest European producers that follow Japan are the UK and Germany. They are almost three times less present in the top forty

⁸¹ Jean K. CHALABY, « American cultural primacy in a new media order, a European perspective », *op. cit.*, p. 38.

companies than their American counterparts. France and Italy come after and are almost four or five times behind in presence on this top 40 list. Another English speaking country follows: Australia; the last European countries present on the list are: Luxembourg and Sweden.

It is a reality that the battle for the dominance of the audiovisual industry is a clash between the USA and Europe⁸². One of the reasons for the supremacy of the USA is the fact that there is no European market but a merely collection of distinct domestic markets⁸³. Further in this chapter we will see how the size of their domestic market gives American producers a solid economic advantage. European audiovisual companies are strong, but only within their niche markets, which are very small compared to the American conglomerate⁸⁴.

An overview of the major European producers

The main European producers are: Germany, the United Kingdom, France, Italy and Spain. They account for the majority of the audiovisual production and distribution of European productions. Thanks to the Eurofiction programme, activity has been monitored from 1996 for these five countries; these records show a clear picture of the evolution of these key European actors and their impact on the single market.

Among the five main European producers, a total of 381 independent production companies (including 13 broadcasters) are involved. Table 4 gives the distribution by country of the total number of companies that these big producer countries possess and the volume in hours of their respective output. This table shows a clear picture of the dispersion of the European market and the weight of each country. The countries with the

⁸² Japan playing an important role with *mangas*, vanguard animations, video games, etc.

⁸³ Jean K. CHALABY, « American cultural primacy in a new media order, a European perspective », *op. cit.*, p. 38.

⁸⁴ *Ibid.*, p. 38.

most important independent production are: Spain, Italy and France with over 89 percent, while in Germany and the United Kingdom it only represents a 46 percent and 40 percent respectively⁸⁵.

Table 4: Number of production companies and production volume in hours

	Number of Companies	Volume in
Germany	164	1,800
Spain	32	1,279
France	78	553
United Kingdom	73	1,463
Italy	34	761

Source, INA/EAO⁸⁶

With this table we can also deduct the average volume produced per company. We can notice that volume differs significantly among the five countries; France (7 hours) and Spain (40 hours). But what is important is that in comparison with American producers, volumes of production of the majority of European companies are so small, they are almost invisible in the international and European market, and are therefore too small to be competitive internationally. The overall average volume production of table 4 results in 15.37 hours per company. If we make a more specific calculation, Germany, who is the biggest producer in Europe (45 percent of all fiction titles) has an average of 10.97 hours per company; France, who produces less in volume of content but more in diversity of titles has an average of 7.08 hours per company. This gives us a clear idea of the difficult situation of the audiovisual industry in Europe and

⁸⁵ European Audiovisual Observatory, «Eurofiction, programming & economy », www.obs.coe.int/online_publication/reports/inasum03.pdf.en, consulted on April 2006.

⁸⁶ European Audiovisual Observatory, «European TV fiction production valued at 2.7 billion Euros », available at: <http://www.obs.coe.int>, consulted on January 2006.

the deficiencies of its production structure. The lack of concentration that characterizes the European audiovisual industry impedes local companies to be competitive and above all, visible in the local and international market. European companies are too small to be noticeable and have any influence in the market.

Unfortunately problems do not end there, the situation continues to deteriorate. Table 5 shows the evolution of the volume of national fiction from 1998 to 2001. From 2000 to 2001, there existed a small increase on the volume of production of 5.7 percent, which barely compensated the decrease of 3.9 percent suffered in the 1999-2000 period. Italy saw its private sector grow the most with a 36.3 percent in the 2000-01 period. France went in the opposite direction, decreasing its production in every sector. The reasons invoked by the European Audiovisual Observatory for this decrease in European fiction production are:

First, the increasing dominance of reality shows in European television schedules. Secondly, the limited financial capacity of independent producers. And thirdly, the poor capacity for renewal and regeneration of European producers, who prefer to approach the market with «a prudent reliance on the tired and tested prevails»⁸⁷.

Table 5: Volume of national first-run TV fiction broadcast 1998-2001 (Source: EAO⁸⁸)

Hours | Heures | In Stunden

			1998	1999	2000	2001	2001/00	2000/99	1999/98	
FR	Public channels	Chaines publiques	Off.-rechtl. Dienste	300	309	295	284	-3,7%	-4,5%	3,0%
	Private channels	Chaines privées	Private Dienste	302	356	319	270	-15,4%	-10,4%	17,9%
	 Total	 Total	 Summe	602	665	615	553	-10,1%	-7,5%	10,5%
DE	Public channels	Chaines publiques	Öffentl. Dienste	1 106	1 055	1 060	1 137	7,3%	0,5%	-4,6%
	Private channels	Chaines privées	Private Dienste	838	773	740	663	-10,4%	-4,3%	-7,8%
	 Total	 Total	 Summe	1 944	1 828	1 801	1 800	-0,1%	-1,5%	-6,0%
ES	 Total (1)	 Total (1)	 Summe (1)	851	1 468	1 199	1 306	8,9%	-18,3%	72,5%
IT	Public channels	Chaines publiques	Öffentl. Dienste	222	311	368	408	10,9%	18,3%	40,1%
	Private channels	Chaines privées	Private Dienste	135	193	259	353	36,3%	34,2%	43,0%
	 Total	 Total	 Summe	357	504	627	761	21,4%	24,4%	41,2%
GB	Public channels	Chaines publiques	Öffentl. Dienste	629	612	655	688	5,0%	7,0%	-2,7%
	Private channels	Chaines privées	Private Dienste	693	711	669	773	15,5%	-5,9%	2,6%
	 Total	 Total	 Summe	1 322	1 323	1 322	1 463	10,7%	0,1%	0,1%
EUR 5	 Total	 Total	 Summe	5 076	5 788	5 566	5 883	5,7%	-3,9%	14,0%

(1) From 1999 includes hours broadcast by autonomic region channels (593 hours in 1999).

Depuis 1999 y compris les heures diffusées par les chaînes des Communautés autonomes (593 heures en 1999).

Seit 1999 einschli. des von den Sendern der autonomen Gemeinschaften ausgestrahlten Stunden volumens (593 Stunden 1999).

To have a more precise idea of the gravity of the problem, a comparison can be made between the European best volume/companies average (Spain), with a European company that encountered huge success in the international⁸⁹ market: FremantleMedia. The best average within the five biggest European producers belongs to Spain with 40 hours per company. If we compare it with the 8,500 hours of programming that FremantleMedia produced in 43 territories in 2004, we can see that there is a huge distance to be covered in order for European companies to compete with big international players. Figure 1 shows a synopsis of FremantleMedia's activities and history.

Figure 1: FremantleMedia, a history of success

FremantleMedia

FremantleMedia is one of the largest international creators and producers of programme brands in the world. With leading productions that range from prime time drama, serial drama, entertainment and factual entertainment programming in around 43 territories, including the UK, the US, Germany, Australia, France, Italy, Spain, Portugal, Scandinavia, Latin America and Asia. The company has production operations in over 25 countries worldwide, present with international brands such as Idols and the world's longest running game show, The Price is Right.

FremantleMedia delivered almost 8,000 hours of original programming to broadcasters around the world, which places it well above other European producers. This volume is possible thanks to the process of concentration that the company experienced between late 1990's – 2000.

Structure

FremantleMedia is the content business production arm of the RTL Group, Europe's largest television and radio broadcast company, with interests in 34 television and 30 radio stations in eleven European countries. RTL Group is 90 percent owned by Bertelsmann AG.

Entertainment

FremantleMedia's entertainment programming ranges from local cult shows like Never Mind The Buzzcocks (UK) to major international hits such as Idols and The Apprentice. Some of the products that have experience most success are: Idols and the Apprentice. Idols has been sold to over 30 countries including: UK, the USA, France, Australia, Poland, South Africa, India and Singapore. It has encountered a great success and has created pop stars in every country it has been aired. The Apprentice, is broadcasted in NBC in the USA, and has been well accepted in the 16 countries it has been licensed to.

FremantleMedia Enterprises

The division also incorporates Fremantle International Distribution, which distributes some 19,000 hours of programmes to broadcasters in 150 countries worldwide.

⁸⁹ USA included

Company history

The company's history is marked by important concentration movements that explain the capacity of production attained at the present. Previously known as Pearson Television, the company changed its name in October 2001. Pearson Television was formerly a subsidiary of international media group Pearson plc. In 1993 Pearson plc bought Thames Television, the leading UK production company behind such long-running series as *This Is Your Life* (BBC1) and *Wish You Were Here?* (ITV1).

Pearson Television was founded after the 1995 acquisition of Grundy, an Australia-based producer of daily serial dramas. Grundy had production capabilities across five continents. In each country in which it operated, Grundy acted as a local producer, employing local production staff and producing in the local language as part of the local culture. Pearson Television acquired All American Television in 1997, which owned classic formats like *The Price Is Right*.

The renaming of the company as FremantleMedia came as a result of Pearson Television's merger with CLT-UFA to form the RTL Group in July 2000, following which it was no longer a subsidiary of Pearson plc. FremantleMedia is 100 percent owned by RTL Group. In December 2001, Pearson plc sold its 22 percent stake in RTL Group to Bertelsmann.

The merger also bought CLT-UFA's programme making companies into the FremantleMedia stable including UFA Film and TV Produktion and Trebitsch Produktion, leaders in the German television production sector. Formed in 1917, UFA was the company behind such film classics as *The Blue Angel* and *Metropolis*, and was the place where screen legends such as Marlene Dietrich, Fritz Lang and Billy Wilder started their careers. UFA is currently responsible for more than 2,000 programme hours a year for both private and public television companies.

Recent developments

The acquisition of a number of small talented production companies, a joint venture with Vogue Planet forms FremantleMedia Japan, another joint venture forms FremantleKM with the help of KM Productions in France and acquires the remaining share of the Dutch production company, Blue Circle.

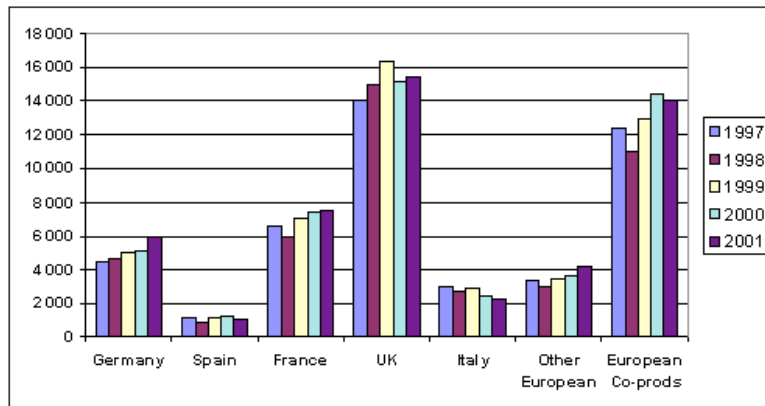
Sources: Company's web-page⁹⁰

As seen before, FremantleMedia's story of success can be in part attributed to its size and concentration strategy. Media companies in Europe need to experience a greater consolidation in order to be able to export successfully, within the European market and abroad. Another big European company that has exported successfully some of its formats is the Netherlands's based: Endemol. Further in this chapter we will see an overview of the history of this company and its presence in Europe and in the international market.

Graphic 1 shows the weight of the biggest 5 European producers in terms of what they export to the European internal market.

⁹⁰ FremantleMedia's web-page, available at: www.fremantlemedia.com, consulted on April 2006.

Graphic 1: Origin of imported European fiction broadcast by television channels in Western Europe (1997-2001) in hours



Source: ETS / European Audiovisual Observatory, *op. cit.*

Graphic 1 demonstrates that the most successful European produced fiction comes from the UK; exporting twice as much as France in the European market. This is explained in part by the language of production, English, the most important vehicular language in Europe and globally. The growing importance of European co-productions that one can appreciate in this graphic should not deceive us and make us believe in a more important cooperation between European producers, for a great deal of American interests are involved. Overall, the hegemony of American producers is extending its presence through co-productions with European companies. Germany along with France were the only countries to register a sensible growth thanks to their big domestic markets, but their volumes of production remain small in comparison to big international players.

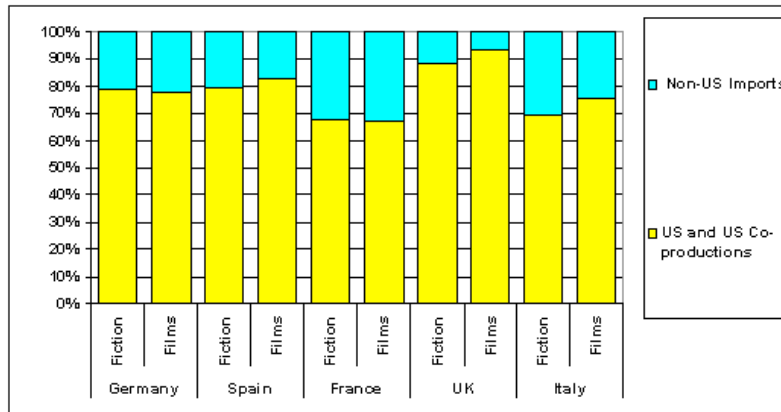
It can be affirmed that part of the audiovisual success of producers of a country is in direct relation with the size of their

national market. This thesis can be applied to the USA, to Germany and France.

Main European markets' dependence on US fiction

Even the five most important producers in the EU cannot satisfy the demand of their domestic markets; European broadcasters depend on US exports to fill their air time. Graphic 2 shows the volume of American fiction and films imported and broadcasted on the biggest audiovisual markets of the EU in 2001.

Graphic 2: Volume of US-originated fiction and films imported and broadcast on television channels in the five principal European markets 2001 (As a percent of the total volume of fiction and film imported and broadcasted)



Source: European Audiovisual Observatory, "American fiction and feature films continue to dominate western European television channel programme imports", available at: <http://www.obs.coe.int/about/oea/pr/a02vol15.html>, consulted on January 2006.

The UK shows the greatest dependence on American imports, which can be explained by the linguistic proximity. France and Italy are the least dependent with a slightly lower percentage of imports of American products. This could be explained in part by the state support to audiovisual production in these two countries.

American media imports: a common denominator for European audiovisual consumption

Europe's audiovisual deficit

As a result of the explosion in the number of channels due to the advent of satellite television, and the process of liberalization and decentralization of television (lead by the television Without Frontiers directive), European broadcasters surpassed their capacity to fill their air time with domestic programmes.

While the American audiovisual industry continues to acquire an increasing European market share, the same cannot be affirmed for European producers in the USA. The American market is still very far in terms of capacity and size for European companies to attain. In addition to the strong grip that American producers have on Western European markets, for Jean K. Chalaby an important factor for the acceleration of the American progression in the old world's market was the fall of the iron curtain. This historic event opened new territories for the eastward expansion of American exports. The estimation of European households including countries from Western, Eastern and Central Europe that have access to multi-channel television attained 126 million in 2005⁹¹. This opportunity has certainly been capitalized on by American entrepreneurs⁹².

⁹¹ Jean K. CHALABY, lectures from the course «Mondialisation des médias dans le contexte européen » at the European institute of the

Deficit augmentation by the demand of Eastern and Central European countries

With the fall of the iron curtain, the markets of countries of Eastern and Central Europe opened to the world. Ironically, more than a decade after their re-attachment to the rest of Europe, these countries do not show a strong demand for Western European audiovisual products, instead, they foster a great dependence on American imports.

Due to their huge domestic market, American producers can perform a semi-monopoly price strategy; the amortization of their costs does not depend on their international exports. They can offer themselves the luxury of adapting their prices to the acquisitive power of their target markets.

Given the fact that the Eastern and Central European block (of countries) was isolated from the Western hemisphere, a dual process took place after the fall of the Soviet system. These nations developed both a desire to open themselves to the world and a revival of national pride. American executives cashed in on the desire of the ex-Popular Democracies to taste what the Western world had to offer. By developing a price strategy adapted to these emergent economies, American companies were able to shorten the cultural distance that separated the countries from the ex-Soviet bloc acquiring a bigger world market share. «East European networks were typically paying semi-token amounts such as \$1,000 or \$2,000 per hour for expensively made Hollywood television fiction»⁹³. This dumping price strategy is somehow resented with bitterness; which drives consciously or unconsciously national publics to demand more national productions in their national languages. So instead of

University of Geneva, Summer 2006.

⁹² Jean K. CHALABY, « American cultural primacy in a new media order, a European perspective », *op. cit.*, p. 43.

⁹³ Jeremy TUNSTALL, David MACHIN, *The Anglo-American Media Connection*, New York, Oxford University Press, 1999, p. 255.

opening towards other European productions, the reflex continues to be, to close themselves within national borders.

Box Office

In the case of box office receipts, American imports have increased during the last decade: 86 percent of the 141 films watched in Bulgarian theatres were American, same for Hungary, with an even greater American domination; in 1995, 93 percent of the spectators who went to the movies saw an American movie, 6 percent a European film and 1 percent a Hungarian film⁹⁴. Moreover, the consumption of these new markets adds up to the already critical deficit of the European audiovisual industry in relation to the USA.

Even if «the number of European films distributed is virtually double that of American films: each year. Between 430 and 560 European films were shown at commercial cinemas, while the number of American films in Europe fell from 277 in 1997 to 173 in 2000. The contrast between the wide-spread dispersal of European films and the concentration of American films suggests that they will achieve very different levels of success»⁹⁵.

Table 6 shows that 348 American films distributed in the European Union between 1996 and 2000 achieved more than one million admissions, while only 165 European films reached that figure. 83 percent of European films failed to achieve 1 million admissions in the EU, while only 66 percent of American films were in that group. This comparison becomes more demoralizing if we take into account admissions achieved

⁹⁴ Eric DARRAS, «L'internationalisation paradoxale des publics, des réceptions à la production des produits audiovisuels en Europe », in Dominique MARCHETTI, *En quête d'Europe : Médias et médiatisation de l'Europe*, Paris, Presses Universitaires Rennes, 2004, p. 87.

⁹⁵ André LANGE, «The ups and downs of European cinema», available at:http://www.obs.coe.int/online_publication/expert/dublin_forum_2001.html, consulted on April 2006.

in the American market. Numbers show that 404 American films achieved over 5 million admissions in Europe and USA pooled, a level attained by only 40 European films. The ratio of «box office hits» made in Europe and the USA is therefore in the order of 1 to 10⁹⁶.

The key factor that could explain this huge difference in box office hits is the national fragmentation of the European market. In spite of the multiple efforts and voluntaristic policies of the Commission, European producers continue to be unable to take advantage of the single market.

⁹⁶ *Ibid.*

Table 6: Success of films distributed in the European Union (Films produced between 1996 and 2000)

Number of admissions (1996-2000)	Number of films	
	EUR	US
50 million or more	0	1
25-50 million	1	7
20-25 million	4	10
15-20 million	3	10
10-15 million	4	28
5-10 million	8	88
4-5 million	14	19
3-4 million	19	39
2-3 million	33	51
1-2 million	79	95
500,000 - 1 million	143	90
250,000 - 500,000	189	80
100,000 - 250,000	288	117
50,000 - 100,000	280	69
25,000 - 50,000	252	71
10,000 - 25,000	286	69
1,000 - 10,000	543	146
1 - 1,000	232	47
Total	2,378	1,037

Source: European Audiovisual Observatory⁹⁷

⁹⁷ André LANGE, «The ups and downs of European cinema », available at: http://www.obs.coe.int/online_publication/expert/dublin_forum_2001.html, consulted on April 2006.

Table 7 provides the market shares of film admissions in the European market. As we can see, the circulation of films among European member States remains minimal. In 2000, the market share of US films was almost 10 times that of the European film's market share outside their national market. National productions represent the double of the inter-communitarian market share, but are still very far from the American share which is almost five times superior.

Table 7: Market shares of film admissions on the European Union market (1996-2000)

Nationality of films	1996	1997	1998	1999	2000
US films	71,6%	65,8%	77,4%	69,1%	73,0%
European films in their own national market	17,5%	21,4%	14,4%	17,4%	15,0%
European films outside their national market	8,3%	10,7%	7,2%	11,5%	8,0%
Others	2,6%	2,0%	1,1%	2,0%	4,0%

Source: European Audiovisual Observatory⁹⁸

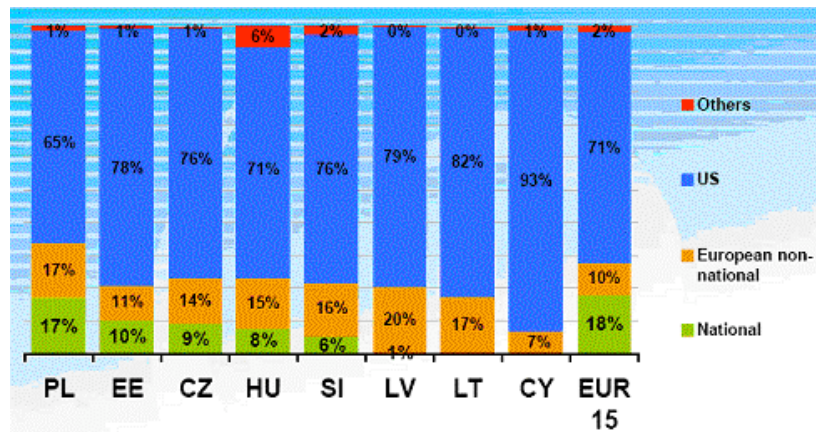
In 2000, European films achieved only 60 million admissions in the European Union outside their national markets (85 million in 1999 and 50 million in 1998). This feeble circulation does not allow European films to take advantage of the potential economies of scale represented by the single market⁹⁹.

⁹⁸ European Audiovisual Observatory, «Analyzing case studies of European film success», available at: http://www.obs.coe.int/online_publication/reports/forum2001_report.html ?print, consulted on April, 2006.

⁹⁹ *Ibid.*

Graphic 3, shows the evolution in 8 markets from the 10 new members in relation to the average of the EU-15.

Graphic 3: Market shares of admissions by film origin, 2002



Source EAO¹⁰⁰.

As we can see, Hollywood’s hegemony is even greater than EU-15’s in 8 of the 10 new EU member states, with the exception of Poland (65 percent). In the rest of the countries, the USA possesses a bigger market share than in the EU-15. Cyprus can be considered the most Americanized movie-goer, the USA holds an impressive market share of 93 percent in this country. Other countries like the Czech Republic (76 percent), Slovenia (76 percent), and Latvia (79 percent) are around the 80 percent of American market share. It is important to add that DVD is

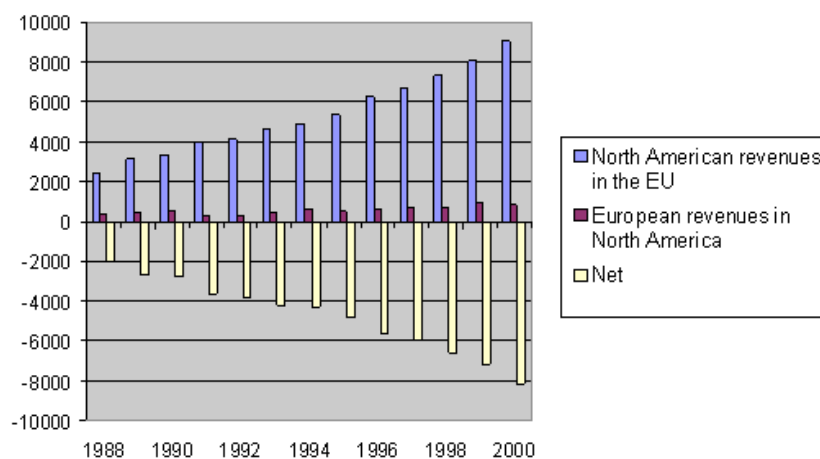
¹⁰⁰ Tim WESCOTT, «Media markets in the new member states of the EU», available at: http://www.obs.coe.int/online_publication/expert/warsaw_newmediamarke ts.pdf.en, consulted on April, 2006.

already becoming an important source of revenue for Hollywood.

Incessant growth of the audiovisual deficit

After decades of uninterrupted growth, the deficit of the European audiovisual sector with the USA attained 8.2 billion US dollars in 2000. In graphic 4 we can observe the evolution of the deficit.

Graphic 4: Origin of imported European fiction broadcast by television channels in Western Europe (1997-2001). In broadcasted hours.



Source: EAO¹⁰¹

¹⁰¹ European Audiovisual Observatory, «The imbalance of trade in films and television, programs between North America and Europe continues to deteriorate», available at: <http://www.obs.coe.int/about/oea/pr/desequilibre.html>, consulted on January, 2006

European revenues in North America continue to stagnate; in spite of the multiple EU's policies, like the MEDIA programme, European producers do not seem able to attain the American market. European broadcasters, on their side, continue to increasingly import American audiovisual goods.

Table 8 presents in more detail the evolution of US companies' sales in the EU and the European companies' revenues in the US for the period of 1995 - 2000.

Table 8: Estimates of the trade in audiovisual programmes between the EU and North America, 1995-2000 (in millions of US \$)

	1995	1996	1997	1998	1999	2000	Progression 1995-2000
Sales of US companies in the EU	5'331	6'262	6'645	7'313	8'042	9'031	+69.4%
EU revenues in North America	518	614	668	706	853	827	+59.7%
EU deficit	4'813	5'648	5'977	6'607	7'190	8'204	+70.5%

Source: EAO (2003a, p. 36) in, Jean K. CHALABY, "American cultural primacy in a new media order, a European perspective", *The International Communication Gazette*, Vol. 68 No 1, 2006, p. 38.

European companies in the American market

European audiovisual companies are present in the American market but in a very little number. As we can see in the following table, the receipts for European exports to the USA were calculated at 827 million dollars in the year 2000, against 853 in 1999, which means a decrease of 3 percent. The UK has the most important share in European exports, with 691 million dollars in 2000. These calculations comprehend co-productions of, for example French television programmes, which increased in a 9.6 percent during the year 2000¹⁰².

¹⁰² *Ibid.*

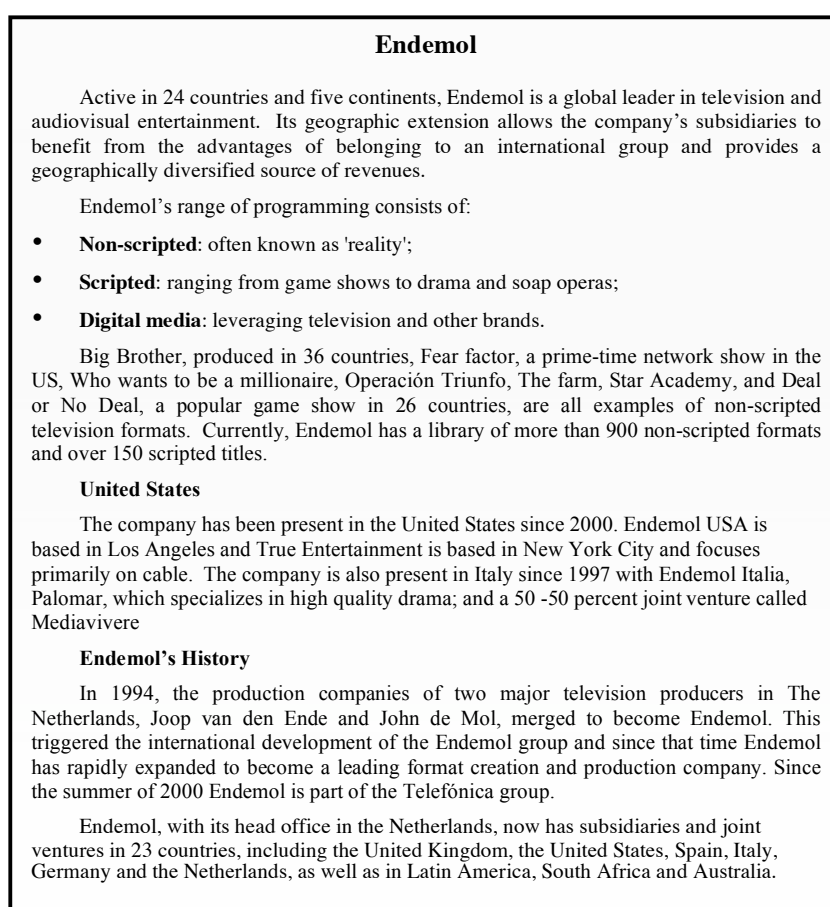
Table 9: Estimates of European revenues in the USA

Estimates of European revenues in North America							
	1995	1996	1997	1998	1999	2000	2000/ 1999
Total GB revenues	426	499	536	550	705	691	-2,0%
- Film company	343	422	343	350	508	511	0,5%
- Television company revenue	83	77	193	200	197	180	-8,5%
Total other EUR revenues	92	115	132	156	148	136	-8,0%
- of which: revenues French films	10	10	32	6	31	7	-77,6%
- of which: revenue for French TV producers	46	84	73	113	87	95	9,6%
- of which: revenue for German film	16	1	8	13	5	9	86,9%
- other European revenues (estimated)	20	20	20	30	25	25	n.a.
TOTAL	518	614	668	706	853	827	-

Sources: European Audiovisual Observatory: «The imbalance of trade in films and television programmes between North America and Europe continues to deteriorate», *op. cit.*

Two examples of European companies that are present in the American market are: FremantleMedia and Endemol. FremantleMedia is present in the USA with successful television programmes like: American Idol, The Apprentice, X Factor, and the world's longest running game show: The Price is Right. Figure 2 presents a brief overview of Endemol's history and current activities.

Figure 2: Endemol's brief history and activities



Source: www.endemol.com, consulted on March 2006.

Endemol is present in the USA with hit programmes that range from non-scripted to scripted. Among the top formats we find: BigBrother, Fear factor, Deal or no deal, Extreme makeover house edition and Who wants to be a millionaire.

Factors that explain American supremacy

Cultural factors

The American market possesses an enormous cultural diversity. Almost 300 million Americans share English as a national language, but for a part of ethnic minorities, English is not their mother tongue. Cultural diversity is at the base of the American society, we could even consider that USA' cultural diversity is broader than Europe's. USA is a country with a long history of immigration. The white Anglo-Saxon protestant (WASP) majority is the product of immigration from diverse European nations. This WASP majority is in no case limited to immigrants of English origin, or as some people calls them: Mayflowers. Irish, Italian, Polish, Russian, Dutch, German, French, Greek, (etc) immigrants have arrived uninterruptedly to the USA for the last three centuries.

In the last decades the African-American community has been surpassed in number by the Latin community, which has become the first minority in the USA. This Latin community shares Spanish as a second (if not first) mother tongue. In addition to the Latin community, the USA's cultural mosaic hosts as well: Asian, Arab and African¹⁰³ immigration communities. As one can see, the USA is a market that has no reason to envy Europe in terms of cultural diversity.

The American giant melting-pot is in a way, a domestic laboratory where audiovisual productions can be *tested* to cover as much cultural distance as possible. To be able to satisfy a culturally-diverse domestic market, American producers are driven to create television that looks for a common denominator, in what Pascal Marchetti calls a *universaliste* approach¹⁰⁴. This American *universaliste* approach can be

¹⁰³ More recent and voluntary.

¹⁰⁴ Pascal MARCHETTI, *La production d'oeuvres audiovisuelles dans l'Union Européenne*, Paris, Economica, 1997, p. 84.

confronted to Europe's *particularisme*. This *particularisme* tends to specialize in a specific niche market exploiting its particularities. It should not be a surprise if European producers have serious problems to conquer Europe's single market, which is characterized as being culturally diverse. European producers do not succeed among other member state's markets because their programmes are plagued by local references and particularities that please their niche markets. The exploitation of these particularities constitutes a barrier for the acceptance of their products by a broader public (outside their niche market). On the other hand, American productions are conceived to appeal a market that is as diverse as it is big; and that is one of the reasons why US' audiovisual products are able cross so easily the world's cultural borders.

In the long term and by sedimentation, people around the world get used to watch American programmes, as a result, the cultural distance that could separate importers around the world and American producers is reduced. In the long run, we are able to witness an increase on the demand of American audiovisual goods, and the emergence of a loyal public that follows certain television series that become cult, some examples are: 24, Sex and the City, the Sopranos, O.C., Lost, Desperate Housewives, Prison Break, CSI (Las Vegas, Miami and Manhattan), and lately Invasion, just to cite some.

Economic factors

It would be naïve to attribute cultural factors the sole responsibility to explain American hegemony on the European market. Economic factors are at the heart of the question and represent the essence of this long lasting domination.

Given the size of their own domestic market, American audiovisual exporters are able to amortize their costs in their internal market. Their price strategy and benefits do not depend from international exports; that gives American producers the possibility to fix extremely low prices to multi-million value

productions in the international market. As a result, they are able to attract new markets and conquer them. Their only constraints are marginal costs; «US media are able to earn extra revenues through massive exports; but the sums of money earned are (with the exceptions of movies) quite small in relation to the number of hours of viewing. A typical citizen of a European country views (and listens to) US audio-visual material for about one hour per day; but the US media only receive about \$20 a year for this, or about five or six cents an hour»¹⁰⁵. Why apply an apparently disadvantageous price strategy?

Some of the benefits that American producers obtain by applying these price practices are: the conquest of new markets and the fact that export success increases the prestige and power of the media industry at home. We should not forget that the Motion Picture Association of America is one of the most powerful lobbies in the USA and possess a strong presence in Washington. This prestige and power enabled Hollywood to reassemble a bigger and more vertical cartel than the one which was declared illegal in 1948¹⁰⁶. American audiovisual producers acquire by this prestige: cultural, economic and political power; and last but not least, they shape USA's view of the world through their screens; they provide the images and sounds that build the picture that the most powerful nation has of the world.

American producers do not compete among themselves in order to establish the prices applied to exports; they are organized to fix prices for each specific market. 85 percent of exported programmes come from nine companies organized at the heart of the Motion Picture Export Association of America (MPEAA)¹⁰⁷. It was until 1988 that revenues of the television sector coming from the international market surpassed the

¹⁰⁵ Jeremy TUNSTALL, David MACHIN, «*The Anglo-American Media Connection* », *op. cit.*, p. 262.

¹⁰⁶ *Ibid.*

¹⁰⁷ C. HOSKINS, R. MIRUS, W. ROZEBOOM, «U.S. television programs in the international market: unfair pricing? », in Pascal MARCHETTI, *La production d'oeuvres audiovisuelles dans l'Union Européenne*, *op. cit.*, p. 79.

interior market revenues; and they even represented the double in 1991¹⁰⁸.

European companies have to compete with cartelized multi-million American productions are sold in the international market for a price that no longer holds any relation to their real cost. American executives can offer themselves the luxury of adapting prices to the acquisitive power of its target market; they establish prices according to price levels at the local market and take into account national regulations.

Hollywood, making it in *the* neighbourhood

Hollywood is a small district in southern California, but by hosting the most powerful industry of cinema, «is not simply a passive receptacle of economic and cultural activity, but a critical source of successful system performance»¹⁰⁹.

Hollywood represents a peculiar conjunction of culture and economics, personified by the motion picture industry of Hollywood; a place where «the aestheticization of the economy and the commodification of culture»¹¹⁰ are crystallized. The city has developed throughout the years an almost organic structure, where «small and medium-sized firms are caught up in extended transactional networks, sometimes in association with larger firms that carry out the basic functions of financing, coordination, marketing and distribution»¹¹¹. All these firms interact together giving body to the economic and cultural tissue that builds this powerful industry. The temporality of productions in Hollywood plays an important role in the organization of the cluster. The fact that productions are not planned over extended periods of time, contributes to the

¹⁰⁸ Pascal MARCHETTI, *La production d'oeuvres audiovisuelles dans l'Union Européenne, op. cit.*, p. 78.

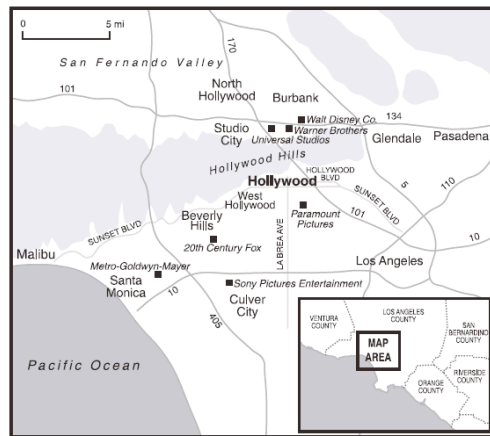
¹⁰⁹ Allen J SCOTT, *On Hollywood*, Princeton, Princeton University Press, 2004, p. 1.

¹¹⁰ *Ibid.*

¹¹¹ *Ibid.*, p. 6.

constant renewal of work relations between firms, which makes possible the continuous regeneration of the Hollywood network.

Figure 3: The geographic situation of Hollywood



Source: Allen J Scott, *On Hollywood*¹¹².

The development of the commercialization of culture that we have witnessed in the 20th century is present in metropolis' like New York, London, Paris, Los Angeles, Tokyo and lately Mexico City and Bombay. Cultural product industries tend to develop in large metropolis' that possesses global influence¹¹³. When crystallized, these powerful articulations of cultural economy are endowed with a great deal of efficiency, competitive advantages, innovative capacities, and durability; and contrary to what we could think, globalization does not dissolve away these qualities, but strengthens them¹¹⁴. However, the conjunction of factors that facilitate the creation of cultural industry clusters is never as clear as in the case of Hollywood.

¹¹² *Ibid.*, p. 2.

¹¹³ *Ibid.*

¹¹⁴ *Ibid.*

This city represents the prototype of a spatial unit that has created a group of synergies with no equal in the world.

This spatial cluster is capable of generating economies on its chain of production; it attracts talented aspirants that see in the city of angels, a concentration of firms that could value their talent and where they could develop their skills. This allows the companies present in the area to renew and «refresh their pools of talent»¹¹⁵.

All these stated conditions provide producers in Los Angeles with the perfect conditions to benefit from and contribute to the synergies produced by the place; these synergies place Hollywood producers in an advantageous position in relation to their competitors in Europe and in the rest of the world. This special and spatial alchemy makes of Hollywood the strongest cultural-economical cluster of our days. In addition to the alchemy produced by the milieu, the industry's aggressive marketing & distribution strategy, and other economic and cultural factors, allows us to predict that in the foreseeable future, the small and sunny district in southern California will continue to be the Mecca of images.

Television programme imports

According to the cultural imperialism theory that dominated the Seventies and the Eighties, television programmes constitute a pernicious cultural vehicle of American culture; it was then assumed that «western media carries an ideological message and thus the impact of this cultural hegemony was an issue, these media acted as the missionaries of capitalism [...] that threatened the viability of local cultures»¹¹⁶.

¹¹⁵ *Ibid.*, p. 7.

¹¹⁶ Jean K. CHALABY, « American cultural primacy in a new media order, a European perspective », *The International Communication Gazette*, Vol. 68, No 1, 2006, p. 34.

Today, communication studies have grown away from *imperialist* theories but American programmes continue to be massively imported by European television broadcasters; US television series are more present in households throughout Europe than European programmes themselves. The explosion in number of channels due to satellite television was thought to be an excellent opportunity for Europe's audiovisual production; it was considered as an opportunity to 'liberate' European media from its dependency towards American productions that inundated the market. These hopes were soon proved wrong. Due to cost constraints, new low budget channels found in US fiction, a cheap way to fill air time programming.

American popular culture embodied in programmes is perceived in official circles and by cultural elites as a threat to national cultures. In official thinking *Americanization* is represented as a threat to European Culture¹¹⁷. This can be explained in part by the ruthless hegemony of American audiovisual production in the European market. Considered as industrial products made for masses of uncultured people, American programmes would have somehow the capacity to *infect* European publics and erode European culture.

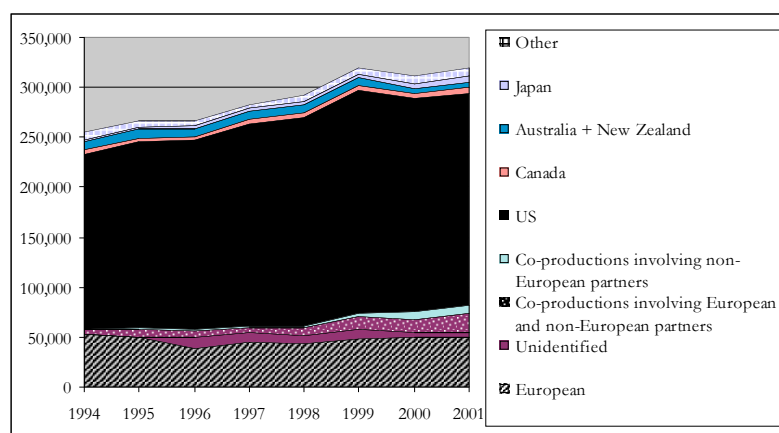
In 1992, the EU member states spent \$3.7 billion on American audiovisual imports. This amount overwhelmingly surpassed the \$288 millions the USA spent on European productions. In 1995, the USA's surplus had doubled to attain \$6.3 billion¹¹⁸.

To have a good view of the evolution of the origin of broadcasted programmes throughout the last decade; Graphic 5 shows the progression of the origin of imported fiction broadcasted by television channels between 1994 and 2001. As we will see, the situation remained stable; the American hegemony was never put into question.

¹¹⁷ Philip SCHLESINGER, « Tensions in the construction of European media policies », *op. cit.*, p. 106.

¹¹⁸ *Ibid.*, p. 105.

Graphic 5: Origin of imported fiction broadcast by television channels in Western Europe (1994-2001). In broadcasted hours.



Source: EAO¹¹⁹

In 2001, for the third year in a row, the volume of American imports declined but was compensated with co-productions involving US producers. American producers are increasing their co-productions to take advantage from cost differences, via lower wages in Europe (due to the absence of unions in the entertainment sector).

In spite of the EU's voluntaristic approach that characterized the creation of directives and programmes in the Eighties, the inter-communitarian audiovisual exchange did not develop as expected. European broadcasters and producers do not exchange audiovisual products among them, but all European broadcasters share American imports. The real common currency of the European audiovisual space is actually the output of American television and film industries. USA producers have

¹¹⁹ European Audiovisual Observatory, «American fiction and feature films continue to dominate western European television channel program imports », *op. cit.*

for a long time created the images that most easily traverse European national barriers; even if they do not dominate prime time, they possess an unrivalled ability to enter each and every national market¹²⁰.

European publics (and publics in general) search for proximity when they watch television. They enjoy and have a preference to programmes that they consider close and relevant to them. Television programmes produced in Europe tend to be so nationally specific that they offer limited scope for audience identification elsewhere on the continent¹²¹. Reflected in news broadcasting and in the creation of fiction, this quest for proximity has complicated the inter-communitarian audiovisual commerce. Linguistic and cultural diversity, in addition to the extreme fragmentation of the European audiovisual market has opened the way to an enormous and efficient American entertainment machine.

American formats shaping European television: The success of television series

The recent success of television series owes much to the late, but effective standardization of the European programming structures. For a long period of time, European producers were in dissonance with the rest of the world in terms of programming practices. To illustrate with an example, we can cite French producers, that as late as 1996 were still making television fiction lasting either 25 minutes, or 90 minutes and ignoring the one-hour length almost entirely. Could one go as far as to attribute this lack of synchronization with the rest of the world as an absence from the drive to export? Only in the late Nineties did French television producers start to make television fiction to match the international standard length of one hour or 50

¹²⁰ Philip SCHLESINGER, « Tensions in the construction of European media policies », *op. cit.*, p. 107.

¹²¹ *Ibid.*

minutes¹²². By not integrating formats that cross more easily programming borders, they demonstrated once more the inwardness of their approach, exploiting their national market as much as possible, but showing very little international ambition.

The European adoption of the commercial scheduling practices of American television¹²³ was necessary for European programmes to be able to compete with US programmes in both the European and the world market.

American series are arranged in episodes of 50 minutes each, a successful season is usually composed of 100 or less episodes. The imitation of this practice by European broadcasters has enabled American productions to enter more easily in European grilles; but on the other hand, by producing in this format, it has as well allowed European producers to be more *exportable* across Europe and the world.

It is only lately that we have seen the development of the *exportable* format of television programmes among European productions and co-productions. The capacity of this genre (television series) has been proved by the importance of the American exports of this category. The ability to attract mass audiences has been demonstrated by the recent increase of the demand for television series. Series possess the ability to construct a circle of followers, who make from this (usually weekly) *rendezvous* a ceremony of entertainment. The success of programmes like CSI (Crime Scene Investigation) has already generated a French 'imitation': RIS, a TF1's creation, which follows the same format, and also includes a subtle reminiscence of a FOX's success story: 24, with Kiefer Sutherland.

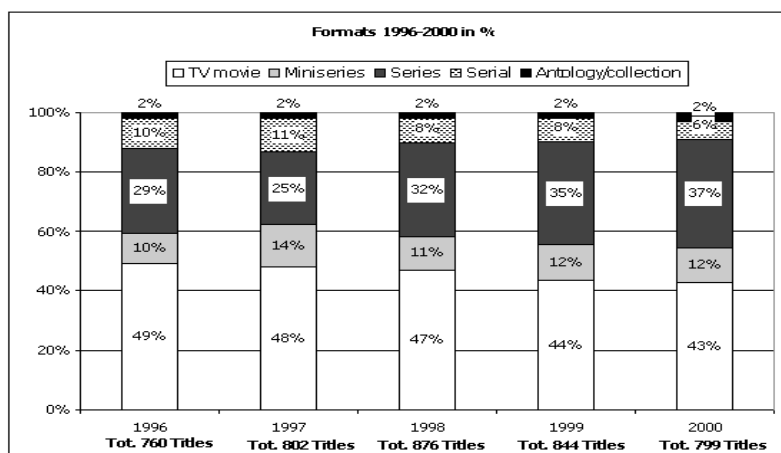
Getting down to numbers, in the European market, series have advanced from 224 titles in 1996, which represented 29 percent of the total supply to 293 in 2000, which corresponds to 37 percent, (half of British fiction, three Spanish productions out of five and more than two French programmes out of five

¹²² Jeremy TUNSTALL, David MACHIN, «*The Anglo-American media connection* », *op. cit.*, p. 225.

¹²³ *Ibid.*, p. 130.

are series)¹²⁴. Following graphic 6 shows the evolution of the genre between 1996 and 2000.

Graphic 6: Domestic first run television fiction programmes by formats in the five biggest European television markets 1996 - 2000 (%)



Source: Eurofiction/ EAO¹²⁵

Given the fact that European broadcasters decide their programming according to economic logic, series are an excellent product; they are an easy way to fill of scheduling spaces, they build audience loyalty, are easily adapted to both prime and day time and can accommodate easily to a wide variety of genres¹²⁶.

¹²⁴ European Audiovisual observatory, «Press release: European TV fiction production in decline », available at: http://www.obs.coe.int/about/oea/pr/pr_eurofiction.html, consulted on January 2006.

¹²⁵ *Ibid.*

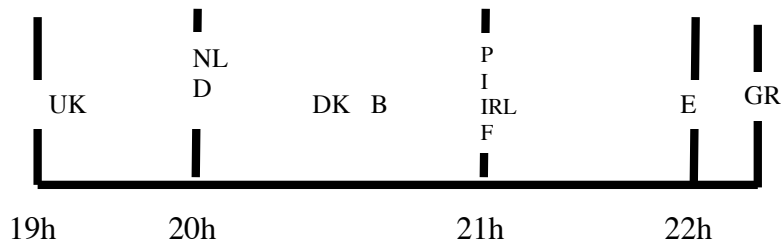
¹²⁶ European Audiovisual observatory, «Press release: European TV fiction

Television series represent a strong standardization force in the world audiovisual market; their success encourages broadcasters in Europe and throughout the world to adopt them. This success ends up by shaping the markets, which adopt American programming structures to be able to profit from series' benefits.

Prime-time is domestic, off prime is American

A uniform European prime-time does not exist; peak audience hours differ among regions in Europe, experts talk about a north/south fissure. Graphic 9 shows the distribution of prime-time for eleven national markets of Europe.

Graphic 7: Prime time of eleven media markets in Europe



Sources : IP, European Key facts, Television 94, in, François HEINDERYCKX, *L'Europe des Medias, op. cit.*, p. 169

As Graphic 7 shows, it would be impossible to choose a prime-time hour segment that would apply to the entire European single market. The north/south fissure is present, with countries like Spain, Greece, Portugal, Italy and France that prefer the latest hours of the day as their peak audience time.

production in decline », *op. cit.*

Even if during the day American programmes flood national schedules, prime-time has proven to be steadily domestic. Table 10 shows the major five European markets in their prime-time and day-time composition.

Table 10: Geographical origin of television fiction programmed by major networks (sample week 12-18 March 2000). In percentages.

		Domestic	US	European	Other
United Kingdom	Whole day	47	43	0	10
	Prime Time only	51	49	0	0
Germany	Whole day	36	57	5	2
	Prime Time only	56	44	0	0
France	Whole day	25	56	15	5
	Prime Time only	75	25	0	0
Italy	Whole day	19	64	4	13
	Prime Time only	43	51	6	0
Spain	Whole day	20	56	7	17
	Prime Time only	51	37	12	0

Source: Eurofiction/EAO¹²⁷

An expansion of domestic fiction erodes American imports, with the exception of the United Kingdom where US productions have advanced to the detriment of local productions; however, if prime-time continues to be domestically produced, after and

¹²⁷ European Audiovisual Observatory, «TV fiction programming: prime-time is domestic, off prime time is American », available at: http://www.obs.coe.int/about/oea/pr/pr_eurofiction_bis.html, consulted on January 2006.

before programming is mostly imported. As a result of this phenomenon, we witness an allocation of the budget that corresponds to this rule. The majority of the share of financial budgets goes to prime-time fiction. Table 11 illustrates the proportion of the financial value between day-time and prime-time productions in the major five European fiction producers.

Table 11: Share of prime time in terms of broadcasted episodes and the financial value of first-run national fiction in each country

	Number of episodes in prime time / total number	Prime time value/ total value
Germany	36.0%	68.0%
Spain	39.5%	64.5%
France	38.5%	73.5%
United Kingdom	65.4%	83.5%
Italy	44.0%	80.5%

Sources: INA/ EAO¹²⁸

Countries invest the majority of their budget on prime-time programmes; the rest is divided to produce day-time programmes. In consequence day-time programmes end up being low-budget (and usually low quality) productions that have to compete with American imports (with millionaire budgets). Hollywood series that are produced for an approximately \$1 million per hour (or a multi-million dollar film)¹²⁹ compete in

¹²⁸ European Audiovisual Observatory, «European TV fiction production valued at 2.7 billion Euros », *op. cit.*

¹²⁹ The American sit-com Friends paid on its last season \$1 million each of the 6 main characters and an average of \$7 millions were spent per episode.

the same time slot with programming whose production cost is only a small percentage of this sum¹³⁰.

The increase of co-productions

In the aim to explain the hegemony of American industry over the European market, communication studies during the 1970's and 1980's gave an important place to the theory of cultural imperialism. Today, a more realistic approach gives globalization a crucial role in explaining America's audiovisual supremacy. The theory that denounced the US cultural imperialism, assumed that American media executives tried to impose their own culture to Europeans¹³¹. All Americans achieved, was to learn to successfully adapt to local tastes and produce audiovisual goods that pleased multicultural audiences. «American companies are gaining hold of the European pay-television market precisely because of their mastery of adaptation and hybridization techniques»¹³². American producers are not worried about imposing their culture but selling it.

European nationally fragmented markets have never arrived to create significant synergies. The articulation of a European audiovisual network of producers is still an illusion. Even a modest development of intra-communitarian commerce struggles to see the day. As a matter of fact, only small countries who share the same language as a big neighbour consume intra-European audiovisual products; for example, Belgium consumes French programmes and German speaking Switzerland and Austria consume German audiovisual products. An incipient European audiovisual production is developing and growing thanks to international investments and co-productions. From the 264 audiovisual companies registered in the EU in 1999, 239

¹³⁰ Jeremy TUNSTALL, David MACHIN, *The Anglo-American media connection*, *op. cit.*, p. 226.

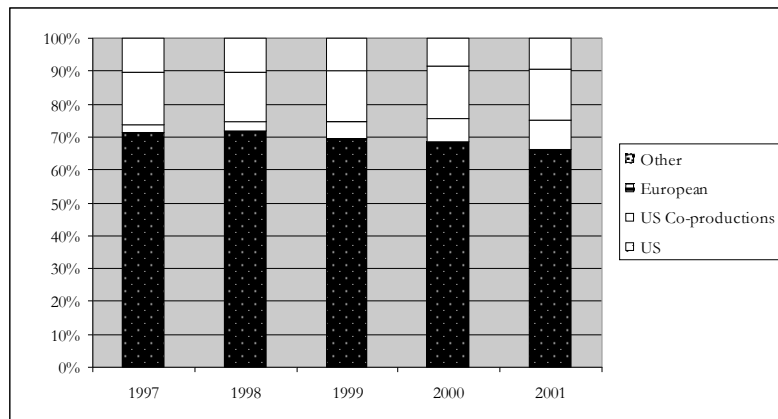
¹³¹ Jean K. CHALABY, « American cultural primacy in a new media order, a European perspective », *op. cit.*, p. 46.

¹³² *Ibid.*

were controlled by American investors. This represents 13.3 billion Euros of assets (87.2 percent). These investments take place at every level of the audiovisual sector, (production, distribution and exhibition, publishing distribution and retail of video television theme channels)¹³³.

Co-productions are acquiring a greater importance among European broadcasters. In 1997 they only represented 6 percent of the total hour volume, in 2001, this number more than doubled to 13 percent. Graphic 8 reflects this progression.

Graphic 8: Imported American, European and other programming broadcast on television channels in Western Europe (1997-2001) percentage of hours broadcast



Source: EAO¹³⁴

¹³³ European Audiovisual observatory, «The imbalance of trade in films and television programs between North America and Europe continues to deteriorate », *op. cit.*

¹³⁴ European Audiovisual Observatory, «American fiction and feature films continue to dominate western European television channel program imports », *op. cit.*

Along with the augmentation of co-productions, comes a transmission (USA → Europe) of know-how that is not negligible. According to Jean K. Chalaby, some European formats have even been exported with great success to the American market, such as reality TV from the Europeans: Endemol and FremantleMedia¹³⁵.

¹³⁵ Jean K. CHALABY, « American cultural primacy in a new media order, a European perspective », *op. cit.*, p. 41.

FOURTH CHAPTER

The construction of pan-European television: A negative definition

As stated previously, the consumption of audiovisual products was believed to be capable of playing an important role in the achievement of a deeper European integration. The role attributed to European media was then «officially defined in opposition to a culturally invasive *Other*, namely the United States»¹³⁶; American culture is seen as a threat to European culture. American audiovisual products that flood the European market are qualified by European cultural elites as mediocre and industrialized; they are also seen as a source of *contamination* that menaces an *indefinable* European identity.

The culturalist approach that denounces invasive and ‘mediocre’ American audiovisual products, makes an amalgam between culture and quality, European culture would constitute then a synonym of quality and *bon goût*. In opposition to culture and *bon goût*, American products are considered as industrial, made for the masses. A European producer is considered to be then an artist and his/her American counterpart a business man/ business woman¹³⁷.

The culturalist approach, strong in the old continent in the Eighties was principally supported by the French government. In February 1983, when the soap opera *Dallas* was a total success throughout the continent, Jack Lang (French minister of culture at the time) declared in Paris: *Dallas* is the «symbol of American cultural imperialism»¹³⁸. As we will see in this chapter, Jack Lang was neither the first nor the last high civil servant to consider

¹³⁶ Philip SCHLESINGER, « Tensions in the construction of European media policies », *op. cit.*, p. 103.

¹³⁷ Pascal MARCHETTI, *La production d'oeuvres audiovisuelles dans l'Union Européenne*, *op. cit.*, p. 102.

¹³⁸ Ien ANG, *Watching Dallas, soap opera and the melodramatic imagination*, *op. cit.*, p. 2.

American exports as forms of cultural invasion. As years passed by and European markets grew increasingly dependent on American productions, the artificial opposition (US vs. Europe) that politicians loved to invoke in order to justify protectionist policies has come to shape the EU's audiovisual policy.

Military metaphors

The enormous surplus that the USA holds against the EU in the audiovisual sector triggers a certain anxiety among European cultural and political elites. It is not unusual to encounter military metaphors when the European audiovisual deficit is addressed by politicians. An excellent example is Jacques Delors' declaration: «Doesn't the defence of freedom, elsewhere so loftily proclaimed, include the effort of each country or each ensemble of countries, to use the audiovisual sphere to ensure the protection of their identity?»¹³⁹. For Jacques Delors forging a European culture through television and cinematic production is a reality and should be conceived as a form of cultural defence. Carlo Ripa di Meana, member of the European Commission, in charge of the culture also denounced in 1987: «*'une véritable colonisation' américaine en matière de programmes télévisuels, ce qui justifiait l'organisation d'un marché unique de ce secteur*»¹⁴⁰.

Another example of a military metaphor is the declaration of the German film director Wim Wenders; «there is a war going on and the Americans have been planning it for a long time. The most powerful tools are images and sound»¹⁴¹. As we know, the USA has dominated the market of the audiovisual since the infancy of television and cinema. According to the previous chapter of this dissertation, cluster, cultural and economic

¹³⁹ Philip SCHLESINGER, « Tensions in the construction of European media policies », *op. cit.*, p. 103.

¹⁴⁰ Pascal MARCHETTI, « La production d'oeuvres audiovisuelles dans l'Union Européenne », *op. cit.*, p. 104.

¹⁴¹ *Ibid.*, p. 106.

factors explain the American supremacy in audiovisual production.

It is a fact that Europe holds a doubly fragile position, economically and culturally. Economically because in spite of the defensive approach held for decades against the USA, a rampant dependence on American audiovisual products continues to exist. Broadcasters continue to need cheap¹⁴² material to fill air time. And from a cultural perspective, Europe's nationally fragmented market has for sole inter-communitarian vehicle of popular culture, the massive importation of American products.

American audiovisual products

Besides the economic and cultural dimensions of the rivalry that *opposes* both the USA and Europe, there also exists a political dimension. These three identitarian elements (economical, cultural and political), are central in the construction of the *us* (Europe) *vs. them* (USA) opposition. It can be affirmed that «*L'identité culturelle européenne se définit 'contre', et l'idée de 'l'Amérique' y joue un rôle essentiel en servant de repoussoir. L'Amérique représente le symbole de ce que l'Europe ne veut pas devenir, un pays de produits industriels, sans culture*»¹⁴³. But is Europe really that different from the USA? There exist long-time shared cultural roots. Besides, if there exist common denominators between national televisions in the continent they are all American! And they go from television fiction to television formats. Cultural sedimentation (product of decades of consuming American audiovisual goods), along with historically-shared cultural traits, connect European and American popular cultures. Together, they constitute a solid base that facilitates communion and sharing.

¹⁴² Cheap in relation to European productions of the same technical quality.

¹⁴³ Pascal MARCHETTI, *La production d'oeuvres audiovisuelles dans l'Union Européenne*, *op. cit.*, p. 104.

Today «the public culturalist model of the late 1980's has been supplanted by an individualizing economic conception of audiences as consumers and of programming as, above all, a commodity»¹⁴⁴. A more market friendly approach has been adopted, and the USA starts to be considered more as a daunting commercial adversary and less as a invasive enemy. From an almost entirely cultural conception of audiences in Europe, we have passed to a more economic conception, which is not deprived from its own dangers. The citizen is seen today progressively as a consumer.

In the *manufactured* process that opposes Europe and the USA, the idea of globalization is assimilated to the idea of Americanization. Americanization is then considered as an imminent threat. It seems that some cultural and political circles do not consider globalization as an opportunity for Europe. In one hand Europe has profited from globalization by building a fairly strong economy, which is in part a product of the exploitation of cheap labour from under-developed countries, and then hypocritically denounces it as a form of cultural contamination. It seems that some European intellectuals and politicians have just discovered that the well doings of the single market and the economic stability of the last decades are based on the market system. Now, with competitiveness rising throughout the world (especially in Asia), *le model social européen* and its superior culture is perceived to be at risk.

¹⁴⁴ Philip Schlesinger, « Tensions in the construction of European media policies », *op. cit.*, p. 103.

FIFTH CHAPTER

Pan-European television

In order to distinguishing pan-European channels from transnational channels, two definitions are proposed. According to François Heinderyckx, we can define pan-European television as: «*Ce qui concerne toute l'Europe, à la différence du simple européen, qui n'implique pas nécessairement l'ensemble*»¹⁴⁵. Transnational media can be defined as: «*les médias diffusant explicitement et délibérément à l'intention d'un ou de plusieurs publics répartis sur une aire géographique transcendant les frontières nationales*»¹⁴⁶. Pan-European channels are available to viewers via cable, satellite bouquets, digital platforms and terrestrial television.

As we can see in table 12, in 2005, 126 million of European households had either satellite or cable.

Table 12: European cable and satellite penetration, 1989-2005 (in millions)

	1989	1994	1999	2005
Television households	120	135	233	264
Cable & satellite households	18	35.7	95	126

Source: Jean K. Chalaby, lectures, *cit.*, Summer 2006.

Until 1980, most European television networks were monopolized by public broadcasters. In some cases, transmissions from another country were not permitted, and in some other cases, it was so laborious to obtain the necessary permits that many abandoned. Television was seen then as an integral part of national identity and its safeguard was as important as the protection of national sovereignty.

¹⁴⁵ François HEINDERYCKX, *L'Europe des médias, op. cit.*, p. 201.

¹⁴⁶ *Ibid.*

The Commission's «Television Without Frontiers» directive led a liberalization and decentralization process that changed television in the Eighties. As a result of this process, international big media companies made their debut in Europe with transnational projects that targeted economic and political elites disseminated throughout the continent. However, the naissance of transnational television was not obstacle free.

Difficulties of the first transnational television channels

In the early days of transnational television, broadcasters faced several problems in order to construct a viable market. The first of these problems was that there were extremely limited reception possibilities. The equipment required to receive signal was so expensive, it could have been considered as prohibitory. By 1989, only 15 million Western European households were connected to cable. Transnational networks had a very limited number of potential viewers, and this restricted public did not attract sponsors. Economic favourable conditions like the single market were not yet crystallized, therefore a very small number of companies produced goods that were adapted to a pan-European market, and as a result, suitable to be advertised on transnational or pan-European channels.

Table 13 presents the progression of the European cable networking from 1989 to 2005. The number of connected households knew an almost exponential growth after the fall of the Soviet bloc.

Table 13: European households connected to cable (in millions)

Year	European households connected to cable (in millions)	
1989	15	Western Europe
1989	31.3	Due to the collapse of communist regimes in central and eastern Europe
2001	75.7	51 percent of all television households in western Europe
2001	107	Total for 2001
2005	126	Total for 2005

Source: Jean K. CHALABY, «Transnational television in Europe: Affluence without influence », in Martyn BOND (ed. by), *Europe, Parliament and the Media*, London's Federal Trust for Education and Research, 2003, p. 14.

The widespread use of English as a vehicular language in the first pan-European projects did not received the expected response. In spite of the fact that English is understood by a large percentage of the population, it was clear after a few years that publics prefer to watch television in their own mother tongue.

Other complications were a result of existent state regulations in order to obtain access to national markets. Finally, due to the fact that many of the new transnational channels broadcasted 24 hours a day, there was an increment of programming demand; difficulties to fill air time lead new channels to increase their American imports.

Some channels that did not survive to the infancy of transnational television were: Super Channel, Murdoch's pan-European: Sky Channel, Lifestyle, Screenport, the BBC's TV Europe and the EBU's Europa TV¹⁴⁷.

Many casualties of the Eighties resulted from the hostile environment that surrounded transnational television in its early

¹⁴⁷ Jean K. CHALABY, «Transnational television in Europe: Affluence without influence », in Martyn BOND (ed. by), *Europe, Parliament and the Media*, London, Federal Trust for Education and Research, 2003, p. 458.

years. Today the European audiovisual market is a mature market and even if technology favours new companies, and there exist many more potential advertisers at a pan-European level, the level of competitiveness has risen.

Youngsters do not watch television like their parents used to, they surf the web instead. With a stable average of two and a half hours per day in front of the television, and a percentage of *connected* households that has attained saturation, the number of television spectators is not projected to grow significantly in the following years. Transnational channels face a European market that is mature and extremely competitive.

The history of transnational television in Europe can be divided in two main phases: The first period, that of its infancy from the early Eighties to the early Nineties; and the second period, in which transnational and pan-European television matured and prospered, from the early Nineties to the beginning of the 21st century.

First period: Early Eighties to early Nineties

During this period that we can qualify as *experimental*, transnational television in Europe saw many projects materialize and evaporate. In this era, transnational channels experienced many difficulties that continue to be present today. Executives were not as prepared to deal with these problems and did not have the experience they possess nowadays. Even powerful media moguls like Rupert Murdoch tried without success to launch a pan-European project (first version of the Sky channel) and decided to opt for a transnational channel that resulted to be more viable. The first television channel transmitting from the OTS Eutelsat satellite was Satellite television and was launched in April 1982¹⁴⁸.

¹⁴⁸ Jean CHALABY, « Transnational television in Europe: affluence without influence », in Martyn BOND (ed. by) *Europe, Parliament and the Media op. cit.*, 2003, p. 14.

Following table 14 presents the most important transnational channels and their respective launch date in the European continent.

Table 14: Major transnational channels and their launch date

Launch dates for the major transnational channels	
Skv News	1988
Eurosport	1989
Public Service Broadcasters	
TV5	1984
3SAT	1984
ARTE	1991
EuroNews	1993
BBC Prime	1995
BBC World	1995
American Broadcasters	
CNN	1985
MTV	1987
Discovery	1989
Cartoon Network	1994
CNBC	1996
Bloomberg	1996
Fox Kids	1996
National Geographic	1997

Sources: Jean CHALABY, «Transnational television in Europe: Affluence without influence », *op. cit.*, p. 14.

Some of the first transnational channels in Europe were projects born at the heart of the European Broadcasting Union (EBU). The only channel that survived the very first ventures under the auspice of the EBU is TV5. Its American counterparts CNN and later on MTV survived and prospered thanks to localization strategies.

Second period: Early Nineties to early 2000, the stabilization of transnational television

The beginning of the decade of the Nineties was difficult, as mentioned before, only some of the channels that were launched at the end of the Eighties survived. But by mid-Nineties the market had changed and channels had also accumulated experience. As seen in a previous chapter, strategies of localization and local investment saved networks like MTV and CNN. Arte, a new channel with a cultural mission was created by public service broadcasters in 1991 as a result of a French-German treaty. Another European project, EuroNews, was born at the heart of the EBU in 1993 as a response to the success of CNN International after the Gulf War. The arrival of other American channels marked this period of transnational television. The Cartoon Network arrived in 1994, CNBC in 1996, Fox Kids in 1996, and National Geographic in 1997.

One of the principal reasons for this new stability and prosperity was the growth in the number of households connected to cable and satellite. As seen in previous table 13, in 2005 a total of 126 million of households were connected¹⁴⁹, which meant a multiplication by five of the 25.1 million connected households of 1991. This amazing growth can be reflected on the distribution increase of transnational channels. Table 15 shows this progress. From an average distribution of 23.39 millions of households in 1997, a progression to 49.02 millions in 2005 can be observed; this represents an impressive increase of 109 percent.

¹⁴⁹ Jean K. CHALABY, lectures, *cit.*, Summer 2006.

Table 15: Full-time distribution of the leading pan-European television channels, 1997-2005 (in million of households)

	1997	1998	1999	2000	2001	2002	2003	2004	2005
<i>Arte</i>	27.4	78.9	61.9	61.9	65.0	65.0	65.0	62.9	60.7
<i>BBC Prime</i>	4.9	6.3e	7.2e	8.2	10.5	10.8	10.6	17.3	22.0e
<i>BBC World</i>	25.1	33.1	39.3	45.5	49.4	56.4	57.5	66.0	72.6
<i>Bloomberg</i>	n/a	27.7	10.3	24.6	30.1	37.6	39.8	48.5	46.7
<i>Cartoon</i>	31.2	36.0	49.7	21.0	28.6	26.9	28.4	31.5	34.9
<i>CNBC</i>	12.6	21.0	26.7	32.9	40.2	41.9	54.3	55.5	63.5
<i>CNN</i>	58.9	67.8	68.8	73.2	81.0	84.7	90.0	95.8	98.2
<i>Discovery</i>	7.0	16.3	20.4	26.7	31.4	32.9	34.3	39.6	42.5
<i>EuroNews</i>	30.4	34.3	34.9	34.0	44.0	48.9	55.5	56.0	62.8
<i>Eurosport</i>	71.9	75.6	80.6	88.3	93.0	95.3	94.4	95.6	101.2
<i>Extreme</i>	n/a	n/a	/	/	/	/	11.8	17.8	19.5
<i>Fashion TV</i>	/	/	27.5e	29.0e	31.5e	32.0e	34.0	34.6	35.7
<i>Hallmark</i>	/	/	/	14.0e	15.0e	17.5e	18.2	20.9	19.8
<i>The History</i>	/	/	/	8.0e	10.0e	11.5e	14.5e	15.0	16.2
<i>Jetix (form.)</i>	/	/	15.4	23.1	25.0	31.0	33.0	36.5	39.6
<i>Motors TV</i>	n/a	n/a	n/a	2.8e	3.7e	9.5e	10.8e	12.1	14.1
<i>MTV</i>	44.1	58.8	79.1	83.6	94.2	92.8	99.2	103.6	107.8
<i>Nat.</i>	4.0	14.9	15.3	19.2	22.9	26.9	31.4	34.4	37.2
<i>Nickelodeo</i>	14.3	/	/	/	15.5e	19.0e	19.7e	20.0e	58.3
<i>Sky News</i>	2.4	/	38.9	18.6	22.7	24.0	24.0	29.7	34.9
<i>Travel</i>	2.8	3.9	/	/	/	18.0e	19.0e	22.0	23.5
<i>TV5</i>	45.5	55.7	57.6	65.1	68.0	71.4	83.7	87.4	94.6
<i>Universal</i>	2.3	7.0	4.5	9.8	15.2	15.2	18.9	20.2	21.0
<i>VHI</i>	12.9	/	20.4	23.1	19.2	18.5	17.7	20.0	22.3
Average	23.3	37.92	38.98	38.75	43.55	45.89	45.05	44.47	49.022

¹The figures from 1997 to 1999 include classic movie channel TNT.

²Universal Studio Networks comprise three channels: SciFi, 13th Street and Studio Universal.

Source: Jean K. CHALABY, lectures, *cit.*, Summer 2006.

Economic indicators had changed by the beginning of the 21st century. From a weak pallet of potential sponsors, transnational channels became an attractive advertising means. The

advertising market initially valued at 31 million Euros¹⁵⁰, was worth 628 million Euros fourteen years later, which represents an impressive 20 fold increase¹⁵¹.

Table 16 shows the evolution of transnational and pan-European channels in a global context; it indicates the part of European distribution of some of the most important channels in relation to their worldwide distribution.

Table 16: European and worldwide distribution of pan-European channels in 2002 (in millions)

Channel	European Distribution	World Distribution	Part of European
BBC World	49	94	52.13%
Bloomberg	38	75	50.67%
CNN International	87	172	50.58%
CNBC	55	180	30.56%
Discovery	35	222	15.77%
MTV	94	382	24.61%
TV5	68	129	52.71%
VH1	19	102	18.63%

Source: Jean K. CHALABY, « Television for a new global order, transnational television networks and the formation of global systems », *op. cit.*, p. 461.

Europe represents a meaningful part of the international channels' market (an average of almost 40 percent). Even if Europe's population is small compared to Asia's or Latin

¹⁵⁰ COLLINS, « Satellite television in Western Europe », in Jean K. CHALABY, « Television for a new global order, Transnational television networks and the formation of global systems », *op. cit.*, p. 460.

¹⁵¹ COLLIDON, « Media and Marketing Europe Guide: Pan-European television », in Jean K. CHALABY, « Television for a new global order, Transnational television networks and the formation of global systems », *op. cit.*, p.460.

America's, economic and technical factors like acquisitive power and the availability of cabling are important factors.

Other transnational channels' progress is due to technology innovations, the Direct To Home (DTH) satellite broadcasting has grown exponentially since 1988 and now represents the European preferred reception mode¹⁵². The digitalization of the image has enabled the compression of the signal, which results in the augmentation of the capacity of transponders of communications satellites to fit a greater number of channels and lower the cost of international transmission by an impressive factor of six¹⁵³.

At present, transnational channels have evolved and are in a much stronger position; they transmit in several languages, cross cultural, linguistic and time-zone borders. They have become powerful globalizing force, «tearing apart the old relationship between place and television»¹⁵⁴.

Concentration movements

Important concentration movements in the world's media industry can be observed; but in spite of this concentration, there exist very few European-transnational projects; this absence can be explained by the *national* character of Europeans' audiovisual consumption. François Heinderyckx asserts that « *les efforts d'expansion et de conquête de marchés s'exécutent plutôt par la création (ou l'acquisition) de médias nationaux ou communautaires* »¹⁵⁵. This can also be attributed to an absence in Europe of a more vertical integration, which in the case of the US market is strikingly present.

¹⁵² Jean K. CHALABY, « Transnational television in Europe: Affluence without influence », *op. cit.*, p. 19.

¹⁵³ *Ibid.*, p. 20.

¹⁵⁴ Jean K. CHALABY, « Television for a new global order, transnational television networks and the formation of global systems », *op. cit.*, p. 462.

¹⁵⁵ François HEINDERYCKX, *L'Europe des medias*, *op. cit.*, p. 227.

The role of news agencies

In the present day, medias are increasingly dependant from the *raw materials* they acquire from news agencies. Along with channels, news agencies have experienced a concentration phenomenon. Today, the flow of news around the world is dominated by two major actors, the USA and the UK, and in particular by the American Associated Press and the British Reuters. These *robinets à images* as Dominique Marchetti calls them, dominate the world of news exchanges. Some channels like CNN, BBC or FOX News have the capacity to establish journalists throughout the world and are able to produce their images by themselves. This requires an incredible amount of human and financial resources that not many companies possess. Before the extreme concentration of news agencies, the European scene was dominated by a cooperation system between public broadcasters (without a lucrative objective). This organization was called Eurovision News and was born under the patronage of the EBU. Today Eurovision News is in a disadvantageous position in relation to the APTN/Reuters oligopoly, but continues to be an important player in the exchange of images and information, especially in Europe.

Dominique Marchetti asserts that this oligopolistic situation of the market leads to a strong homogenization of the coverage of international news. The present homogenization of pan-European and world's news coverage can be explained by the market logic. News agencies are the result of a more demanding environment. News, images and pictures are expected to be available at the very moment events happen. After the Gulf War, the news' world was changed forever. People expected to have in television an open window to the heart of the conflict. This new and more demanding environment requires an enormous investment, in terms of human and financial resources. News agencies are able to create synergies and by the volume of their exports, they are capable of generating scale economies; which produce profits and reduces the costs of their customers.

One of the differences between Reuters and APTN and channels like CNN, that are able to produce their own images is that: «Reuters TV, and APTN deliver each week at least a few minutes of video stories to over one billion people, CNN delivers bigger hunks (hours, not minutes) of news around the world to a much smaller audience»¹⁵⁶.

The future of transnational channels

Even if pan-European television is going through a of localization strategy phase, transnational channels constitute a strong globalizing force. According to Jean K. Chalaby, «Cross-border channels help sustain the globalizing process [...] they add to the flow of information, providing networks of communication and systems of exchange that drive the integration of these fields on a world scale»¹⁵⁷.

The influence transnational channels have is very little in comparison to the diffusion they have in the European continent¹⁵⁸. In the Middle East for example, transnational channels (like Al-Jazeera), exercise a more important influence; this can be explained by the lack of credibility of Middle East national channels. In addition, Middle East publics are much more linguistically homogenous than their European counterpart, and most importantly, Al-Jazeera is an independent media that one can trust.

The future of transnational television will appertain to media companies that have the ability to construct networks that are localized and adapted to market tastes. «Today, American companies run the most extensively localized

¹⁵⁶ Jeremy TUNSTALL, David MACHIN, *The Anglo-American media connection*, *op. cit.*, p. 81.

¹⁵⁷ Jean K. CHALABY, « Television for a new global order, transnational television networks and the formation of global systems », *op. cit.*, p. 458.

¹⁵⁸ Jean K. CHALABY, « Transnational television in Europe: affluence without influence », *op. cit.*, p. 21.

channels in Europe»¹⁵⁹, they have taken product adaptation a next step by creating what Jean Chalaby calls hybrid cultural products¹⁶⁰.

The case of EuroNews as an elitist pan-European television channel

The decade of the Eighties was a decade of significant advances in the audiovisual sector; the European Parliament demanded a communitarian television and the European Commission worked in the directive Television Without Frontiers. The democratic deficit exposed by the lack of participation in the European parliamentary elections of the Seventies was resented in Brussels as a threat to the European project; moreover, the activities of the political machine of EU lacked from a televised platform; it is important to recognize that European summits, discussions on the Parliament and the activities of the Commission are rarely covered by national channels. Further in this chapter some of the reasons that could explain the coverage deficiency of the institutions of the EU will be explored.

EuroNews appeared in the early Nineties with the aim to: showcase European institutions, counterbalance CNN International in the European information-arena; and last but not least, to facilitate the European integration. It was in its most important mission that EuroNews failed.

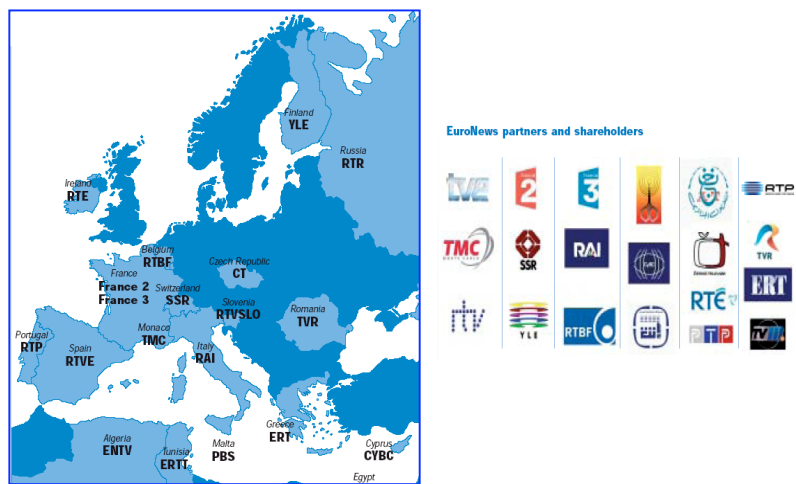
EuroNews' mission to represent a strong response to CNN has been successfully accomplished. Thanks to its multi-lingual broadcasting and its partnership with national television channels, such as TVE, F2, F3, RAI, TMC, RTV, YLE, RTBF, ERT, TVR, RTP, SSR, RTR & RTE¹⁶¹. EuroNews has imposed itself as one of the first pan-European news channel.

¹⁵⁹ *Ibid.*, p. 45.

¹⁶⁰ *Ibid.*

¹⁶¹ EuroNews' web page, available at: www.euronews.net, consulted on January 2005.

Graphic 9: EuroNews' partnerships throughout Europe



Source: EuroNews' web site. *op. cit.*

It is important to take note of the absence of German and British associates among the partners of the *pan-European* channel. Differences between French and German partners for the localization of the channel's headquarters¹⁶² resulted on the Germans abandoning the project. The British absence is also regrettable. Without these two important partners (Germany and the Great Britain are among the five biggest audiovisual producers of the continent), the channel cannot really consider itself as truly pan-European.

EMS Surveys

EuroNews targets the upmarket consumer (top 20 percent of the population by revenue); therefore, EMS surveys are vital for the channel. EMS surveys are a «battery of surveys tracks down this lucrative but elusive audience at a pan-European level. One of the leading surveys is the European Media and Marketing Survey (EMS), conducted every year since 1995. Its universe concentrates on Europeans living in the top 20 per cent of the population by income. In 2005 EMS universe's representative sample was of approximately 24,000 respondents disseminated in 16 countries, 41 per cent of individuals have a university degree, two thirds own two cars or more, the majority make several business trips a year and hold a variety of financial investments»¹⁶³. Table 17 shows the distribution of pan-European channels in this exclusive market.

¹⁶² The Germans wanted the headquarters of the channel to be located in Munich, and it was finally the French who obtain them in Lyon.

¹⁶³ EMS Guide, 2005, p. 19, in Jean K. CHALABY, lectures, *cit.*, Summer 2006.

Table 17: PETV weekly reach in EMS regular universe of 40 million European, 1997-2005. In percentages.

<i>Channels</i>	1997	1998	1999	2000	2001	2002	2003	2004	2005
<i>BBC World</i>	3.3	4.4	5.7	6.3	6.6	7.8	9.7	11.4	10.5
<i>Bloomberg</i>	-	1.7	2.0	3.7	5.2	4.6	5.0	5.7	5.3
<i>CNBC</i>	2.0	3.9	4.5	5.3	6.1	5.6	5.8	7.0	6.4
<i>CNN</i>	15.5	16.1	18.2	17.2	19.5	17.0	18.5	19.0	18.7
<i>EuroNews</i>	12.1	13.3	16.5	16.0	15.2	15.0	15.0	16.9	15.9
<i>Sky News</i>	9.5	9.5	10.5	10.7	10.2	9.7	12.2	14.2	13.2
<i>News/business</i>	28.4	29.3	33.9	33.9	33.7	32.6	36.3	38.6	37.4
<i>BBC Prime</i>	0.5	0.7	0.7	0.6	0.6	0.6	1.0	0.9	0.9
<i>Deutsche Welle</i>	1.8	1.9	2.2	2.5	1.6	1.4	1.6	1.7	1.7
<i>Discovery</i>	8.4	9.2	10.4	12.5	12.9	13.7	14.1	16.1	15.1
<i>Eurosport</i>	32.5	33.2	33.3	34.3	30.8	28.9	27.5	31.1	29.3
<i>MTV</i>	13.5	14.1	15.6	16.0	16.7	15.6	23.4	27.9	25.6
<i>National Geographic</i>	-	-	6.0	8.0	9.0	9.7	11.0	12.6	11.8
<i>Travel Channel</i>	2.3	3.1	3.7	4.3	4.6	4.7	-	6.3	6.3
<i>TV5</i>	5.4	5.1	6.5	6.6	6.5	6.3	6.6	7.1	6.8
General PETV	40.3	41.1	43.2	44.8	43.7	44.5	46.9	50.8	48.9
PETV	42.0	41.7	43.4	44.6	43.1	44.6	48.1	48.7	48.4

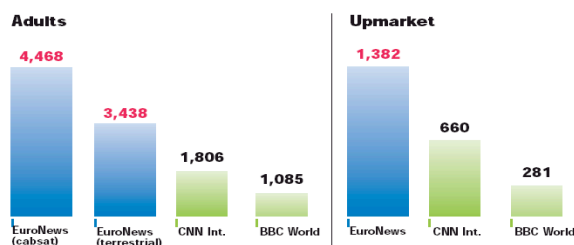
Source: Jean K. CHALABY, lectures, *cit.*, Summer 2006.

In the specific case of EuroNews, in the third quarter of 2004, the channel reached a European daily reach of 4.46 millions of viewers versus CNN Int.'s 1.80 millions.

Graphic 10: EuroNews, number one in Europe

EuroNews 1st in Europe

3rd quarter 2004 - Daily reach in '000



Source: EuroNews web site,

Focusing on high-income earners (the top 20 percent of households by income) in 16 countries of Europe, EuroNews has a daily reach of 1.331 millions of viewers; versus CNN int.'s 0,660 millions¹⁶⁴.

The mission to become the «audiovisual arm of the European Union»¹⁶⁵ was more difficult to accomplish. Due to the difficulties to cover the sometimes colorless events in Brussels, this objective was not carried out with success. This issue will be analyzed in a more profound manner later on, when the difficulties of *making European television* are explored.

¹⁶⁴ European Media and Marketing Survey, EuroNews' Information booklet, available at: www.euronews.net, consulted on January 2005.

¹⁶⁵ Andreu CASERO, « European-wide television and the construction of European identity. The case of EuroNews », *Formats3, Revista de Comunicació Audiovisual Instituto Universitat del Audiovisual, Barcelona*, 2001, available at: http://www.iaa.upf.es/formats/formats3/cas_a.htm, consulted on December 2004.

The channel's history and guidelines

EuroNews, was created in 1992 and started its transmissions January 1st of 1993. EuroNews was the first news channel to transmit 24 hours a day in seven languages: French, Italian, Spanish, Portuguese, German, English and Russian. Conceived by a consortium of 18 European public service broadcasters (all members of the EBU) and supported by the EU, EuroNews had the mission to constitute a European response to the quasi-monopolistic power of CNN Int.'s pan-European coverage, especially after the Gulf War. France saw EuroNews as a pan-European project that could represent a real European counterpart for Anglo-Saxon news channels, specifically CNN Int. and BBC World.

This pan-European type of project was made possible by the «Television without Frontiers Directive, adopted in 1989, and which objective was to facilitate the free flow of audiovisual products across Europe and to create a European audiovisual space»¹⁶⁶. Initially, the objective was the creation of a news channel that would be presented initially in five European languages and that would constitute a cultural and political showcase for the European Union.

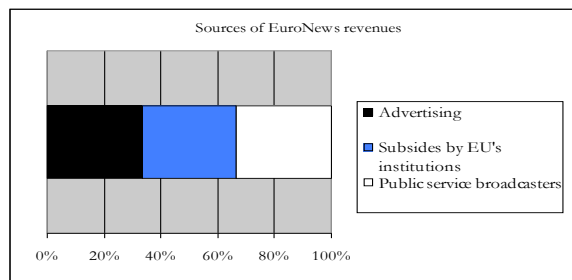
A clear voluntarism is perceived behind the EuroNews project. In a Parliament report, W. Hahn makes clear the faith EU institutions had in the power of television to facilitate a better European integration. In the Hahn Report it was stated that: «Information is a decisive factor, it may be the most decisive of all, of the European unification [...] the unification of Europe will be achieved only if Europeans desire it. Europeans will not desire it if there is not a European identity. A European identity will not develop if Europeans are not informed in an adequate manner. Until today the information that is presented on the mass media is controlled in a national

¹⁶⁶ R. COLLINS, « The European Union audiovisual policies of the UK and France », in Jean K. CHALABY, « Transnational television in Europe, the role of pan-European channels », *op. cit.*, p. 187.

level»¹⁶⁷. At that stage, the vision of a *European channel* was already in the process of being crystallized. The idea of the necessity of a pan-European showcase was evident. However, this principle assumes that information can be used as a homogenizing factor. This premise is denied by Phillip Schlesinger in his article «From cultural defence to political culture»; information, he says, is presented in terms of a homogenizing factor or a will-articulator. He thinks this idea reveals itself to be extremely idealistic and voluntaristic; it represents as well a quest for a desired social order.

As if the mission to help to integrate Europe did not bear sufficient complications, there was as well the economic factor. Two periods in the life of EuroNews can be distinguished. At the moment of its creation in the early Nineties when its *vision* and its *mission* (supported by public channels), was a priority. The second period of its history was characterized by economic contingences. The economic difficulties of the channel appeared when revenues from publicity revealed not to be at the expected level. As seen in graphic 13, advertising revenues are just one third of the total revenue; participations from public broadcasters constitute another third; and finally subsidies from the institutions of the EU complete the total. With only one third of the revenues coming from advertising, one can consider the channel as heavily subsidized, and therefore not yet completely successful.

¹⁶⁷ European Parliament, Working papers (Document 1-1013/81), « On radio and television broadcasting in the European Community», Rapporteur: W. Hahn, 1982, p. 8.

Graphic 11: Sources of EuroNews revenues

Source: Jean K. CHALABY, lectures, *cit.*, Summer 2006

After the economic vicissitudes cited before, finally the decision to sell part of the company to the private sector was taken in 1994. 49 percent of the shares were bought initially by the French Alcatel-Alsthom- that subsequently sold to the English ITN in 1997.

Even with today's given conditions: «the powerful combination of satellite and cable networks feeds the rapid expansion of European transnational television as cable connections allow millions of households to receive cross-border programming and channels at a low cost»¹⁶⁸, publicity revenues are far from what broadcasters would desire. Pan-European channels have to compete against national channels for advertising revenues. It is a rough fight; national channels have a strongly anchored position, they possess a long tradition within their audience and above all, hold the greatest part of the market share. «The audience for PETV channels is extremely small and their market share rarely passes the 1 percent mark»¹⁶⁹.

Economic constraints play a very important role in the absence of *live journalism*. These constraints impede the channel from having a human figure to impart warmth and life to the sometimes cold and monotone stream of information.

¹⁶⁸ Jean K. CHALABY, « Transnational television in Europe, the role of pan-European channels », *op. cit.*, p. 188.

¹⁶⁹ *Ibid.*, p. 189.

EuroNews' difficulties of making European television

EuroNews, the channel with a European *calling* was meant to become a real «European laboratory in the European construction»¹⁷⁰. EuroNews is a team of European journalists in the search of a European vision of the news.

One of the most important challenges for EuroNews was its multi-linguistic approach. Transmitting in seven languages was both a setback and an opportunity. Given the linguistic mosaic that is Europe, the *product* needed to be adapted to the market. «For upmarket Europeans of whom:

- 91 percent watch news in their own language
- 25 percent do not speak any foreign language
- 56 percent do not use English for business

[...] a multilingual news service becomes a necessity»¹⁷¹. Language diversity made it impossible to have an anchorman and live correspondents. This deficiency has revealed itself to be decisive. In consequence, one can observe an absence of warmth and life, the information is presented by a news channel «without a face»¹⁷². Broadcasting in seven different languages is exploited as a competitive advantage in a market that demands a high linguistic specialization. This advantage has a price. To broadcast in multiple languages means as well to combine different journalistic styles and habits. Conformed as a European team, EuroNews had to harmonize these differences.

The channel's information is presented from a European point of view. The goal is to be European without ending up in a merely juxtaposition of national journalistic styles¹⁷³. Journalists should avoid at any cost sounding *French* or *German*

¹⁷⁰ Olivier BAISNEE, Dominique MARCHETTI, *EuroNews, un laboratoire de la production de l'information européenne*, Renn, Presse Universitaire du Renn, 2004.

¹⁷¹ EuroNews' web page, available at: www.euronews.net, consulted on October, 2004.

¹⁷² Olivier BAISNEE, Dominique MARCHETTI, *EuroNews, un laboratoire de la production de l'information européenne*, *op. cit.*

¹⁷³ *Ibid.*

or *English*, these languages are merely *vehicles* to reach a European audience that is Belgian or Swiss but speak French, for example; national references should be avoided as well. «The existence of permanent debates in the core of the redaction office shows the difficulty to find an editorial coherence that can satisfy the team of journalists»¹⁷⁴. The unfortunate result is «*le ton EuroNews*»¹⁷⁵, which is an extremely neutral sound, so neutral we could think it is broadcasted from space.

The nature of the news

Covering *European news* means to regularly cover the activities of the EU's institutions such as the European Commission and the European Parliament. «The conditions that allow an event to transform into news are very rarely found in European subjects»¹⁷⁶. Some experts argue that the processes are boring, they constitute political commitments instead of *victories* and there is a lack of culminating moments»¹⁷⁷. Images are crucial when presenting news; and the images that EuroNews receives from *European coverage* are not very poignant. Among the available images are the classic *shake hands please* shown to boredom. This represents a clear example of an evident image deficit. This image deficit is an intrinsic deficiency proper to the nature of this type of news. The nature of television news requires topics that are striking and hit sensible chords. It is difficult to find events that are human and hold close relevance to people when reporting on the activities of the EU's

¹⁷⁴ *Ibid.*

¹⁷⁵ *Ibid.*

¹⁷⁶ Theo M. LOCH, «Europa als Nachrichtenwerk», in Marcel MACHILL, « La multidimensionalidad de un laboratorio europeo periodístico: Euronews », *Analisi, Quaderns de Comunicació i Cultura, Universitat Autònoma de Barcelona*, Vol. 20, 1997, p. 37.

¹⁷⁷ *Ibid.*

Institutions. Images resulting from *European coverage* are, «in journalistic jargon: not sexy enough for television»¹⁷⁸.

Symbolic deficit

European viewers are not familiar with the political figures of the European *machinery*. Besides their own national representatives there are no widely known faces at the communitarian level, «the absence of political symbols, the relatively original mechanisms for the power distribution in comparison to national mechanisms, debates and stakes are perceived as esoteric. The biggest consequence of this symbolic deficit it is the difficulty to present in images this political *game*»¹⁷⁹. Contrasted with a nation, which possesses a deep symbolic, cultural, historic, folkloric and social anchorage, the European Union does not represent a political and cultural unity. According to Shalini Venturelli, «the ‘reinvention of democracy on a transnational scale’ through television programming without borders and communicational policies is not possible»¹⁸⁰.

The unfortunate location of EuroNews

Finally, EuroNews is located in the suburbs of Lyon, far away from the febrile activity of London, where most of the pan-European or international broadcasters are based. The lack of synergy produced by an industry’s environment represents a

¹⁷⁸ Olivier BAISNEE, Dominique MARCHETTI, « EuroNews, un laboratoire de la production de l’information européenne », *Cultures et conflits*, No 38-39, 2000, available at : <http://www.conflits.org/document283.html>, consulted on january 2006.

¹⁷⁹ *Ibid.*

¹⁸⁰ Shalini VENTURELLI, «The imagined transnational public sphere in the European community’s broadcast philosophy: implications for democracy», in Marcel MACHILL, « La multidimensionalidad de un laboratorio europeo periodístico: Euronews », *op. cit.*, p. 40.

setback for EuroNews. Brussels or Strasbourg might constitute good locations for the channel, given its European calling; the downside is that there might exist the risk of an over-institutionalization of the news-channel.

The case of Arte

On November 4th of 1988, during the 52nd French-German summit, Helmut Kohl and François Mitterrand officially announced the creation of a cultural French-German television channel. Finally on October the 2nd of 1990, they signed a treaty in Berlin. This treaty would provide the technical and juridical conditions for the operation of the channel. Officially, the channel was created on April 30th of 1991. Since its creation, Arte has been criticized for the conditions of its conception and qualified as a politics' caprice.

Even if it was born as a Franco-German cooperation, Arte is today associated to other public channels: RTBF in Belgium, SRG, SSR Idée Suisse in Switzerland, TVE in Spain, TVP in Poland, ORF in Austria, YLE in Finland, NPS in Netherlands, BBC in the Great Britain and SVT in Sweden.

According to its Article 2, Arte's objective is to: « *concevoir, réaliser et diffuser, ou faire diffuser, par satellite ou par tout autre moyen, des émissions de télévision ayant un caractère culturel et international au sens large, et propres à favoriser la compréhension et le rapprochement des peuples en Europe* »¹⁸¹. Arte's mission is to favour the communication and the understanding between European nations. Contrary to EuroNews, Arte does not specialize on news coverage. The core of Arte's programming are: documentaries and cultural programming that portrays European issues through human stories. Arte's schedule is divided in seven main categories:

¹⁸¹ Arte's internet page, available at: <http://www.artetv.com/fr/services/tout-sur-ARTE/la-chaine/38976.html>, consulted on March 2006.

thema, cinema, fiction, documentaries, magazines, spectacles and information.

According to Jean-Michel Utard, «*Dans son article premier, le traité garantit expressément l'indépendance de gestion et de programmation de la chaîne (...), telle indépendance constitue une exception qui la place dans 'un troisième espace' qui viendrait s'intercaler entre les logiques inter marchés et les logiques interétatiques*»¹⁸². This specificity places Arte in a crucial position to show what a hybrid audiovisual product can offer.

Arte struggled in its debut to conciliate its position between French and German approaches. For Germans, journalism was central, but for the French, the journalistic approach was too informative, too attached to political logics and too far from artistic logic that produces the visions of the world¹⁸³.

The difficulties that Arte faced before its consolidation in the European market were not very different from the ones EuroNews encountered. Arte had to conceive a discourse that transcended the national references of its journalists. Above all, equilibrium was pursued. The redaction is composed equally by French and German journalists, editor chefs are one of each nationality¹⁸⁴. According to Jean-Michel Utard, Arte's *journal télévisé* is a hybrid between a European journal and a bi-national one, which is in a way: «*l'indice d'une transnationalité in progress*»¹⁸⁵.

Thematic and regional channels represent a good model for the future. For Jean Chalaby, «European public broadcasters must think less in terms of national market and more in terms of genre; they need to engage more in transnational production and distribution projects»¹⁸⁶. The model of ARTE constitutes a good

¹⁸² Jean-Michel UTARD, « Des médias européens ? L'exemple d'Arte », *op. cit.*, p. 88.

¹⁸³ *Ibid.*, p. 89.

¹⁸⁴ *Ibid.*, p. 90.

¹⁸⁵ *Ibid.*, p. 91.

¹⁸⁶ Jean K. CHALABY, « American cultural primacy in a new media order, a European perspective », *op. cit.*, p. 49.

blend for the future, it does not try to re-invent European television, it attempts to construct a winning equilibrium between the local and the regional.

The difficulties of creating pan-European television

European news is in journalistic jargon: not 'sexy' enough for television. News worthiness has changed over the years; news is increasingly in the quest for proximity and local relevance. The impossibility to *sell* Europe is more evident than ever, when the same images of shaking hands and arrivals at European summits are seen over and over, one can understand why the general European public is not very interested.

Besides the nature of the news, pan-European channels face barriers of national and cultural origin. Europe's diversity derives in a wide variety of lifestyles, distinct national prime-times¹⁸⁷ and last but not least, different tastes, interests and language diversity; all these conditions complicate the creation of pan-European television. To organize a uniform pan and trans-European content and scheduling for the whole continent would be impossible. In addition to this, Europe's differences of school days and holidays make the creation and scheduling of television programme seasons almost impossible to harmonize¹⁸⁸. State regulations on decency, nudity, explicit scenes and violence vary from country to country, making difficult the conception of audiovisual products that could easily traverse national frontiers.

The difficulties of European coverage

In the case of European news coverage, if differences in lifestyles, national prime times, languages and holidays were not

¹⁸⁷ Jean K. CHALABY, « Transnational television in Europe: affluence without influence », *op. cit.*, p. 23.

¹⁸⁸ *Ibid.*

enough, there are also deeper rooted difficulties. One of the most important ones is that Europeans do not find Brussels' activities relevant enough. In their minds: «*L'Europe est d'abord purement diplomatique pour devenir ensuite économique*»¹⁸⁹. Eurocrats denounce the fact that national medias amalgam European news with coverage from the Institutions of the EU, which makes them *artificially* distant from the Public lives.

But the problem is much deeper than this and has its origins in the symbolic and democratic deficit of the European construction. European Publics are not politically versed in the context of the EU. If at a national level, governments are struggling to persuade people to participate in their own national political scene, it can be asserted that enthusiasm for Strasbourg and Brussels is not for tomorrow.

Disenchantment from politics and above all, a disillusion from politicians are palpable in Europe, as well as in the rest of the occidental hemisphere; this is reflected on the lack of participation and a lack of interest in today's politics. If to this general disenchantment the singularity and complexity of the European project are added, it is understandable that the essence and functioning of the different European institutions might seem to most Europeans like an esoteric ensemble. The face of the EU that Publics see in news coverage is always the same parade of politicians who shake hands and talk in cryptic terms, spicing their speeches with expressions like subsidiarity, Coreper, white and green papers and all sorts of majorities.

¹⁸⁹ Nicolas HUBE, « L'Europe à la Une : la nécessaire nationalisation de l'actualité communautaire en France et en Allemagne », *MediaMorphoses* Vol. 3, No 12, 2004, p. 56.

White Paper on a European Communication Policy (February 2006)

In this White paper, the Commission accepts to be conscious of the communication gap between European citizens and the institutions of the EU. This text recognizes that «Europe's communication with its citizens has not kept pace»¹⁹⁰. The Commission invites through this text national, regional and local authorities, European political parties and civil society to participate in a *partnership approach*. This text hopes to constitute a «forward looking agenda for better communication to enhance the public debate in Europe»¹⁹¹. In spite of recognizing that the majority of the European political life takes place at a national level, the Commission instates member states to take a more active role in the promotion of a European debate at the heart of national public spaces.

One of the principal objectives that foresee the white paper on a European communication policy is the creation of a «European charter or code of conduct on communication» and an «Observatory for European public opinion». This charter or code of conduct would establish common principles and norms that should guide information and communication activities on European issues. Besides aiming for the empowerment of citizens and an improved openness of the communitarian institutions, the text also proposes to work with the media and new technologies.

Working with the media and new technologies

The Commission acknowledges the importance of medias in the construction of a European public space. This text reminds there are over one thousand accredited journalists present in Brussels;

¹⁹⁰ European Commission, « White Paper on a European Communication Policy », February 2006, p. 2.

¹⁹¹ *Ibid.*

it also discusses the reinforcement of «Europe by Satellite, that supplies video, sound and images to the media on behalf of the three main EU institutions, and the European Parliament plans to open itself up to the public via web television»¹⁹².

The proposed strategy to work with the medias and new technologies focuses on three main objectives:

- Give Europe a human face;
- Attain a greater commitment from pan-European media, national, regional, local politicians and institutions;
- Exploit the potential of new technologies such as the internet through the creation of the *i2010 Initiative*, which seeks to create a European information society.

Even if this White Paper addresses important issues, it is clear that there is still an enormous breach between the people of all walks of life and the objectives/wishes of the Commission.

When Dr. Anna Melich¹⁹³ was questioned about the symbolic deficit of the European Commission and how the strategy to give the EU a human face presented on the White Paper on a European Communication Policy, could change things, she responded by accusing national medias for their lack of interest, and member state politicians who organize press conferences at the same time as members of the Commission during European summits. She also affirmed that medias choose deliberately to show these *protocol* images in spite of having a wide variety of images, available at «Europe by Satellite». The question is: are the images provided by Europe by Satellite really different (and more inviting) than what is usually shown? She also suggested that under the «Giving Europe a human face» objective, a set of tours that European commissioners will make to member states will enable help citizens to identify them better and be more familiarized with the well doings of the Commission. It seems

¹⁹² *Ibid.*, p. 8.

¹⁹³ Question formulated by the author to Dr. Anna Melich, political counselor of José Manuel Durão Barroso for communication and public opinion affairs and ex-responsible for the Eurobarometers. In the frame of the «Ecole doctorale en Communication et médias» at the castle of Coppet, on February 15, 2006.

that members of the commission do not understand the abyss perceived by Europeans between their own national political practices and EU's functioning. Citizens from member states struggle to have a good grip of their own political affairs. How could a European commissioner who visits from time to time their country and that appears a few seconds in the nightly televised journal change something?

To achieve a more efficient transmission of the European message, national medias bring into play nationally relevant personalities. National politicians present at European summits are a vehicle to create proximity between national publics and coverage of the EU. This practice is denounced by the Commission that affirms that member states' politicians take the protagonist role when the affaire favours them and blame the EU, making it a scapegoat when convenient. But from a more pragmatic perspective, without this process where national characters act as intermediaries between what happens in Brussels and publics on member states, the distance between the EU and people from all walks of life would be insurmountable.

The absence of European *Demos*, or a more precise description of Europe and Europeans, makes it difficult for medias to find human stories to illustrate European issues and consequently, to attach local relevance to European news. Brussels coverage and the same images of 'protocol news' portray a Europe of *Cratos*. Citizens of the EU are conscious of this, 60 percent of them have the feeling that political and social changes are imposed to them, and 49 percent among them declare themselves not satisfied about the procedures to decide the development of the EU¹⁹⁴. The EU that citizens perceive is one of no *Demos*, only *Cratos*.

At a transnational and pan-European level, television network's «localization procedures might help cross-border channels remain relevant in a multicultural environment, but

¹⁹⁴ Pierre GIACOMETTI, « L'Europe politique face à la nouvelle opinion », in Guillaume GARCIA, Virginie LE TORREC, « L'Union européenne, saisie par l'information télévisée », *op. cit.*, p. 53.

cannot on their own iron out all difficulties associated with transnational television»¹⁹⁵. Television in Europe is obligated to take into account national preferences. The two key concerns on European coverage are: relevance and proximity. How to portray EU news as relevant in the eyes of Europeans? and, how to give news a sense of proximity when covering the EU institutions? These are the two difficult challenges of transnational, pan-European and regional medias.

The European consumer does not exist

Another difficulty of the past and present history of transnational and pan-European channels is the absence of a homogenous European consumer. In addition to the market's heterogeneity, there exist few companies that produce goods that are ready to be exported to the whole single market; they either require a slight adaptation on the presentation or on the content. The principle of the single market continues to work every day towards the realization of the four liberties (free movement of people, goods, services and capitals), but the European consumer is still far from being homogenous.

Differences in language, lifestyles, cultural uses and customs, make Europe not yet a single and smooth market, but a mosaic of different national markets where transnational and pan-European channels struggle to attract sponsors. New theme-regional projects that target transnational public segments are a good example of what can be done to take advantage of a more efficient market segmentation.

When conceiving marketing campaigns, marketers face a deep rooted problem: the absence of a shared heritage of myths and symbols among European countries. From national flag colours, to perceptions of what is natural, clean, efficient, violent or simply comic complicate the creation of messages

¹⁹⁵ Jean K. CHALABY, « Transnational television in Europe: Affluence without influence », *op. cit.*, p. 23.

that say the same thing to a multiplicity of publics. The degree of adaptation that publicity campaigns have to go through depends obviously on the product. Most of the time, there is a core campaign structure and further adaptation is made by local companies, who are better placed to understand the uses and customs of the plaza. The most successful pan-European campaigns are characterized by the absence of dialogues, the use of more *universal* images, and sometimes catchy English songs. In questions of marketing, publicity campaigns are compelled to go «from the Agora to the Archipelago»¹⁹⁶ approach.

Today, the only public that can be considered as relatively homogenous is the elite public. They share the top 20 percent of incomes, a vehicular language: English, preferences for luxury trade marks and most importantly, the financial and cultural capital to be able to consume transnational or pan-European media, such as: The Financial Times, EuroNews, Arte, TV5, Mezzo, etc. As seen in Table 18, the sectors that spend the most in pan-European advertising are companies that target incomes above the average of the majority of Europeans; among this sectors that sponsor pan-European channels are: tourism, culture and leisure, publishing, clothing and accessories (especially luxury brands), corporate, and sports & equipment sportswear.

¹⁹⁶ FRANÇOIS, NEVEU, «Pour une sociologie politique des espaces publics contemporains», in Dominique MARCHETTI (sous la dir. de), *En quête d'Europe: Médias et médiatisation de l'Europe*, op. cit., p. 78, p. 58

Table 18: Top 10 sectors by spending on pan-European television

2000	2002	2004	2005
Culture & leisure	Services	Travel & tourism	Travel & tourism
Computers & IT	Travel & tourism	Services	Telecommunications
Telecommunications	Automotive	Culture & leisure	Transport
Services	Culture & leisure	Telecommunications	Culture & leisure
Automotive	Telecommunication	Automotive	Services
Travel & tourism	Publishing	Sport equipment	Publishing
Sports equipment	IT	IT	Energy
Publishing	Corporate	Audio & photo	Clothing & access.
Corporate	Sport equipment	Clothing & access.	Corporate
Clothing & access.	Clothing & access.	Corporate	Sports equipment & sportswear

Source: Jean K. CHALABY, lectures, *cit.*, Summer 2006.

Table 19: Selection of rates for a 30-second advertising slot

Channel	Period	Time	Price (€)
<i>BBC World</i>	Peak time	19:00-00:00	2,103
<i>CNBC Europe</i>		17:00-19:00	1,565
<i>CNN</i>		19:00-00:00	5,390
<i>Discovery</i>	Primetime		2,278
<i>EuroNews</i>	Evening peak	19:00-20:00	2,650
<i>Eurosport</i>	Average		4,500
<i>Fashion TV</i>	Primetime		1,000
<i>Sky News</i>	Evening peak	19:00-00:00	1,740
<i>TV5</i>	Prime 1	19:00-20:59	1,500

Source: Jean K. CHALABY, lectures, *cit.*, Summer 2006.

Table 19 shows the rates for a 30 seconds advertising slot in the major pan-European channels. Following table 20 presents the top PETV's buying agencies, with its principal clients.

Table 20: PETV's top buying agencies

Agency	Billing 05(€M)	Billing 04(€M)	Billing 02(€M)	Holding company	Major clients
<i>MediaCom</i>	29	24	26	WPP	Dreamworks, Emirates, Nokia, Shell, Tourism Australia, Universal Music
<i>ZenithOptimedia</i>	29	28	22	Publicis	British Airways, HP, Hyundai, Lexus, Toyota, Zurich
<i>Carat</i>	26	29	30	Aegis	Adidas, Disney, Lego, Philips, Toyota, Vodafone
<i>Starcom</i>	24	23	22	Publicis	Aviva, Delta Airlines, Johnie Walker, 20 th Century Fox, UBS
<i>MindShare</i>	21	20	22	WPP	Gillette, HSBC, IBM, Nike
<i>Mediaedge:cia</i>	20	20	21	WPP	Canon, Estée Lauder, Intel, Nestlé, Sony Ericsson, Visa
<i>Media Planning Group</i>	17	18	21	Havas	Accor, Airbus, BNP Paribas, Dassault, Lacoste, Peugeot
<i>Universal McCann</i>	14	13	15	Interpublic	ExxonMobil, Motorola, UPS, Xbox
<i>OMD</i>	13	13	9.5	Omnicom	Allianz, Bridgestone, Columbia Tristar, General Electric, McDonald's, Siemens, Sony
<i>Initiative</i>	12	12	17	Interpublic	Continental Tyres, Rossignol, Samsung, Tommy Hilfiger
<i>Eurolab (BKM)</i>	2	2	2		Domino's Pizza, Hornby
<i>BJK&E</i>	2	1.5	0	WPP	Financial Times, Systems Capital Management

Source: Jean K. CHALABY, lectures, *cit.*, Summer 2006.

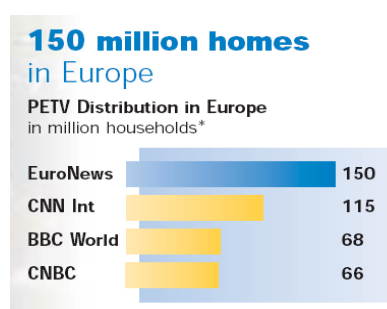
The absence of a pan-European mass media

The absence of a European public space is at the very origin of the denounced democratic deficit. The lack of a public space that

could legitimize the European democracy in addition to the mediocre place that the European Parliament occupies, are the two main faults of the EU's political system.

The non-existence of a mass communication media, where a European public space could emerge, constitutes one of the most important deficiencies of the European political project. The existent pan-European medias are either not concerned exclusively with European coverage, or are solely consumable by elites. In a previous sub-chapter an excellent example of a pan-European elitist channel was explored: EuroNews. The cultural capital required to watch highbrow channels like EuroNews or Arte is not present in the majority of Europeans. And even if these channels have achieved a certain success and an important distribution in Europe (as Graphic 12 shows us); they do not possess the required diffusion to be real counterparts to national channels. As it has been stated, «the audience for PETV channels is extremely small and their market share rarely passes the 1 percent mark»¹⁹⁷. The absence of a mass European media hurts the comprehension and future of the project.

Graphic 12: Pan-European television channels distribution in Europe



Source: EuroNews' web site, *op. cit.*

¹⁹⁷ Jean K. CHALABY, « Transnational television in Europe, the role of pan-European channels », *op. cit.*, p. 189.

Languages, the Babel of Europe?

At present time, the European Union recognizes 20 official languages and about 60 other indigenous and non-indigenous languages spoken over the geographical area. The official languages of the EU are: Spanish, Danish, German, Greek, English, French, Italian, Dutch, Portuguese, Finnish, Swedish, Czech, Estonian, Latvian, Lithuanian, Hungarian, Maltese, Polish, Slovak and Slovene. Sub-national regional languages like Catalan, Welsh, Breton, Galician, Occitan, Irish or Basque fight for a better recognition of what they believe as their right to be considered as official languages. As a result, the EU is an enormous self generating Babel because as it promotes linguistic diversity, it increases ironically the difficulties of communication¹⁹⁸.

This linguistic diversity constitutes (if not the most) an important barrier in the creation of transnational or pan-European television. As seen before, some transnational or pan-European channels have opted to make multi-lingual television, some of the best examples are: the bilingual Arte, which broadcasts in French and German; the multilingual EuroNews, that broadcasts simultaneously in seven languages: English, French, German, Italian, Portuguese, Russian and Spanish; and Eurosport, that transmits in 14 languages to 43 countries. For these multilingual channels, technical innovations like dual sound or trivox¹⁹⁹ (derived from stereo sound), that allow spectators to choose between two or three language versions, have meant an excellent opportunity to diversify their offer.

But the recourse to bi or multilingualism is not an infallible formula. «To consume (audiovisual products) in another

¹⁹⁸ Philip SCHLESINGER, « The Babel of Europe? An essay on networks and communicative spaces » *ARENA Working papers*, Vol. 22, 2003, available at http://www.arena.uio.no/news/publications/publ_wp.htm, Consulted on January 2005, p. 4.

¹⁹⁹ François HEINDERYCKX, *L'Europe des medias*, *op. cit.*, p. 217.

language runs against the line of least resistance»²⁰⁰; it has been proved that publics overwhelmingly prefer to watch television in their own language. Therefore, even if almost half of Europe is already Multilingual (45 percent²⁰¹), and vehicular languages are to be found in Europe (English, French or German), it is clear that publics prefer to watch television in their mother tongue.

The language policy of the EU

Under the watchword: «The more languages you know, the more of a person you are», the European Commission reaffirms its own commitment to multilingualism²⁰². The Commission's policy of official multilingualism is illustrated by diverse resolutions and action plans. All of them recommend measures to promote linguistic diversity and language learning. One of the latest is the Action Plan 2004-2006, adopted by the European Commission on July 27, 2003. The Action Plan 2004-2006 makes concrete proposals for 45 actions to be undertaken in this period of time, in three broad areas: firstly, the key objective of extending the benefits of language learning to all citizens as a lifelong activity; secondly, the need to improve the quality of language teaching at all levels; and thirdly, the need to build in Europe an environment which is really favourable to languages²⁰³.

²⁰⁰ Philip SCHLESINGER, « Tensions in the construction of European media policies », *op. cit.*, p. 108.

²⁰¹ *Ibid.*

²⁰² European Commission, « Multilingualism in the EU », December 2001, available at:

http://europa.eu.int/comm/education/policies/lang/policy/index_en.html.

²⁰³ European Commission, «Promoting language learning and linguistic diversity:

An action plan 2004 – 2006», July 24 2003, available at: http://europa.eu.int/comm/education/doc/official/keydoc/actlang/act_lang_en.pdf.

EU publications are translated in all official languages; the commitment of the Commission can be illustrated by the 74.588 millions Euros spent by the Publication's Office on 2003²⁰⁴ (not including the augmentation due to the 2004 enlargement). Another illustration of the multilingual policy of the EU is the programme BABEL (Broadcasting Across the Barriers of European Languages), which is as an initiative of the Commission and the EBU.

In spite of programmes, action plans, European days of languages, European founding projects like Lingua, Leonardo da Vinci and Comenius, directed to European citizens, English continues to advance in every day's communication; even in internal papers of the Commission: «In 1970, 60 percent of texts in the Commission were initially drafted in French, and 40 percent in German. In 1989 the figures were French 50 percent, German 9 percent, and English 30 percent. By 1997 the figures were French 40 percent and English 45 percent»²⁰⁵. It can be affirmed that even if the Commission is loyal to its convictions and honours its commitment to the multi-lingual principle of the EU, there are broader and greater forces that surround it, such as globalization and the progress of interconnectivity. The advance of English as a European lingua franca is for tomorrow, but its political acceptance and recognition is another story.

Translation in the EU

Since the enlargement of 2004, the EU operates in 20 official languages. To make a parliamentary session possible,

²⁰⁴ Annual Management Report 2003, office for official publications of the European communities, available at: http://publications.eu.int/general/whatitis_en.html, consulted May 12, 2005.

²⁰⁵ Robert PHILLIPSON, « English yes, but equal language rights first », *The Guardian Weekly*, Thursday, April 19, 2001, available at: <http://www.guardian.co.uk/GWeekly/Story/0,3939,475284,00.html>, consulted on March 2006.

simultaneous translation in these 20 official languages demands 60 interpreters²⁰⁶. But in spite of this great effort, «the need for translation takes away the cut and thrust of a normal parliamentary debate»²⁰⁷. And to illustrate with an example: «When the Italian Prime Minister, Silvio Berlusconi, last year likened a German MEP to a Nazi camp guard, it took several seconds before the German realized he was being insulted and pulled off his headphones in disgust»²⁰⁸.

Today the EU runs the most extensive translation operation in the world, the only international organization that could rival the EU are the United Nations, but with only six official languages they are only a third of the size of the EU's translation department (20 languages)²⁰⁹.

To have a clear view of what the enlargement meant in matters of translation needs, here are some numbers.

Before and after:

In 2003, The European Commission had 1,300 translators

They processed 1.5 million pages a year

They cost the EU 550 million €

After 1 May 2004, staff almost doubled

They translate now 2.5 million pages a year

Source: BBC News²¹⁰.

²⁰⁶ James OWEN, « With 20 official languages, is EU lost in translation? », *National Geographic News*, Feb, 2005, available at: www.nationalgeographic.com/news/2005/02/0222_050222_translation_2.html, consulted on March 2006.

²⁰⁷ Angus ROXBURGH, « Translating is EU's new boom industry », *BBC News*, Thursday, 8 April, 2004, available at: <http://news.bbc.co.uk/2/hi/europe/3604069.stm>, consulted on March 2006.

²⁰⁸ James OWEN, « With 20 official languages, is EU lost in translation? », *op. cit.*

²⁰⁹ *Ibid.*

²¹⁰ Angus ROXBURGH, « Translating is EU's new boom industry », *op.*

Officially, the position of the EU is radical, it would be unimaginable to impose or even suggest the establishment of an official lingua franca²¹¹, namely English; but in the coulisses of Brussels, the massive use of English is a reality, and even internal drafts produced by European institutions are mostly written in English, French and German. The language policy of the EU that relies on massive translation is unrealistic and extremely inefficient. If it is true that in the case of parliamentary sessions it is necessary to grant every popular representative the possibility to express him/herself in his/her mother tongue, this practice should be restricted to its minimal extent. Translation consumes a precious European budget that could be put to a better use, for example to contribute to a better economic integration of the 10 new members of the EU. The language policy of the Commission, translates the chimera of equality into illusions of multilingualism and translatability; the colossal translation operation of the EU is taken as a token for equality²¹².

The linguistic panorama of the EU

Europe's linguistic diversity is enormous and Europeans are good with languages. Almost half of Europe is already multilingual, 45 percent of European citizens can take part in a conversation in a language other than their mother tongue. For example, in Luxembourg, nearly everyone speaks another language well enough to hold a conversation; this is also true for more than 80 percent of the people living in the Netherlands, Denmark and Sweden. People in the UK, Ireland and Portugal are least likely

cit.

²¹¹ Dr. Anna Melich, *op. cit.*

²¹² Robert PHILLIPSON, « English yes, but equal language rights first », *op. cit.*

to speak another language, only a third of them affirms to speak another language²¹³.

Table 21 shows the most widely spoken languages, and the percentage of people speaking them.

Table 21: Most spoken languages in Europe (EU-15, in percentages)

Language	EU pop. speaking it as a mother tongue (%)	EU pop. NOT speaking it as a mother tongue (%)	Total proportion speaking this language
Deutsch	24%	8%	32%
Français	16%	12%	28%
English	16%	31%	47%
Italiano	16%	2%	18%
Español	11%	4%	15%
Nederlands	6%	1%	7%
Elinika	3%	0%	3%
Português	3%	0%	3%
Svenska	2%	1%	3%
Dansk	1%	1%	2%
Suomi	1%	0%	1%

Source: European Commission, «Languages of Europe»²¹⁴.

The most spoken language in Europe is English with a great contribution from people who speak it as a second language (31 percent); native speakers only represent a 16 percent from the total of 47 percent. The second most spoken language is German, with a great input from native speakers, who represent a 24 percent of the total (32 percent), people who speak it as a second language being only 8 percent.

²¹³ European Commission, « Languages of Europe », 2006, available at: http://europa.eu.int/comm/education/policies/lang/languages/index_en.htm.

²¹⁴ *Ibid.*

Besides their mother tongue, around 3 out of 4 people in the Netherlands, Denmark (77 percent) and Sweden (75 percent) speak English well enough to take part in a conversation. In Luxembourg (86 percent) are most likely to speak French, in Belgium, this is the case for 38 percent of the population; in both countries, French is one of the official languages. In Luxembourg, 77 percent of people who do not consider German as their mother tongue can speak it well. German is also very popular among people in Netherlands (59 percent) and Denmark (49 percent). In comparison with 1990, the proportion of people who speaks English well enough to take part in a conversation has increased in Europe. The largest advances took place in the Netherlands (+15 percent), Greece (+13 percent), Belgium, Denmark and Italy (+9 percent)²¹⁵.

English, Europe's lingua franca?

As seen previously, English continues its progress in the old continent. In the present day, English is most widely *spoken* language in the EU, in spite of being the mother tongue of only 16 percent of the European population.

English spoken in Europe, also known as *Globish*, is denounced by cultural and political elites, especially among *francophones*, who see it as an American imperialist threat. Among its most virulent detractors, are French intellectuals like Bernard Cassen, who declared that « *il existe un lien logique entre la soumission volontaire ou résignée à l'hyper puissance américaine et l'adoption de sa langue comme unique outil de communication internationale* »²¹⁶. The widespread use of English as a lingua franca in Europe has been transformed in a politically charged issue. For these elites, people who employ

²¹⁵ European Commission, « Languages of Europe », *op. cit.*

²¹⁶ Bernard CASSEN, « Un monde polyglotte pour échapper à la dictature de l'anglais », *Le Monde Diplomatique*, janvier 2005, available at : www.mode-diplomatique.fr/2005/01/CASSEN/11819, consulted on January 2006.

English and encourage its use as a lingua franca *render* themselves face to the imperialist power of the USA. They also denounce the inequality of the *distribution of situation*: ideology and economic benefits that are unfairly attributed to native speakers. At this stage of the world's interconnection, fear towards cultural imperialism should be a thing of the past. The use of English as a lingua franca represents an opportunity for Europe, not to substitute culture and national languages at a national level, but as a precious tool of communication. Europe, more than ever, is in need of better understanding and cooperation.

The 'most useful' languages to know

The future is clear, Europe will continue to invest in multilingualism, as Robert Frost said it once: «Good euro-neighbours should speak several languages and not build fences»²¹⁷; but it is also true that English will continue to advance in next generations. To cite an example, Table 22 shows that when asked, 77 percent of EU citizens consider that children should learn English as their first foreign language. English is number one in all countries polled, except the United Kingdom, Ireland (for obvious reasons) and Luxembourg. French follows next with a 33 percent share and German receives support from only 28 percent of respondents²¹⁸.

²¹⁷ Robert FROST, *in* Philip SCHLESINGER, « The Babel of Europe? An essay on networks and communicative spaces », *op. cit.*, p. 4.

²¹⁸ European Commission, « Europeans and their languages », special Eurobarometer 243, February 2006.

Table 22: Which two languages, apart from their mother tongue do you think children should learn?

	English	French	German	Spanish	Russian	Italian	Swedish
EU25	77%	33%	28%	19%	3%	2%	0%
BE	88%	50%	7%	9%	0%	1%	-
CZ	89%	9%	66%	4%	9%	0%	-
DK	94%	13%	62%	13%	0%	0%	0%
DE	89%	45%	3%	16%	6%	2%	-
EE	94%	6%	22%	1%	47%	0%	1%
EL	96%	34%	50%	3%	0%	6%	-
ES	85%	44%	14%	4%	0%	1%	-
FR	91%	2%	24%	45%	0%	6%	-
IE	3%	64%	42%	35%	1%	4%	0%
IT	84%	34%	17%	17%	0%	0%	-
CY	98%	49%	19%	2%	4%	4%	0%
LV	94%	6%	28%	1%	42%	0%	0%
LT	93%	6%	34%	2%	43%	0%	0%
LU	59%	83%	43%	2%	0%	1%	-
HU	85%	4%	73%	3%	2%	2%	-
MT	90%	24%	13%	2%	-	61%	-
NL	90%	22%	40%	21%	0%	0%	-
AT	84%	29%	2%	10%	4%	11%	-
PL	90%	7%	69%	1%	10%	1%	-
PT	90%	60%	8%	7%	-	0%	-
SI	96%	6%	69%	3%	0%	12%	0%
SK	87%	7%	75%	3%	6%	1%	0%
FI	85%	10%	24%	3%	10%	0%	38%
SE	99%	17%	35%	31%	1%	0%	1%
UK	5%	71%	34%	39%	1%	3%	-
BG	87%	13%	49%	5%	14%	1%	-
HR	82%	5%	69%	2%	0%	14%	-
RO	64%	34%	17%	7%	2%	8%	-
TR	72%	12%	52%	1%	2%	1%	-

= First language
 = Second language

Sources: European Commission, "Europeans and their languages"²¹⁹.

The future of multilingualism in Europe

European linguistic diversity is here to stay. The defence of national languages is well anchored in the idiosyncrasy of every nation as a result of the close relationship between the safeguard

²¹⁹ *Ibid.*

of national languages and national education systems. In addition to this, sub-national regional languages demand further recognition.

It can be affirmed, that this linguistic diversity that lies at the very core of the European project (and often considered as a strength), constitutes an important handicap for the crystallization of a European communicational space. How efficient²²⁰ is the principle of encouraging language diversity? While it is unthinkable to impose the use of a lingua franca, languages become state-supported receptacles of what Europe lacks, national identity and symbolic representation. For those who advocate the use of English as the Euro for communication, reasons for optimism are real. According to David Held, «the cultural space of a nation-state is being rearticulated by forces over which states have, at best, only limited leverage»²²¹. Therefore, even if language diversity has been declared as a founding principle of the EU, it can be predicted that the international environment —especially economic and globalization forces— will exercise pressure and will re-direct the way the EU communicates. This transformation is already a fact in the coulisses in Brussels and Strasbourg, where French and German have been massively substituted by English.

Otto Bauer and Karl Deutsch assert that the culture's sphere of influence extends only as far as the communicative possibilities of the language²²² and conclude by saying that «social communication produces collective cohesion—and invites us to share in a common fate»²²³. If a European culture's sphere of influence depends largely on language; is Europe condemned to renounce the possibility of constructing a common future? Was deciding in the past to bet on linguistic

²²⁰ I employ of the concept of efficiency without depriving culture from its obvious importance.

²²¹ David HELD, « Democracy and the Global Order: From the Modern State to Cosmopolitan Governance », *op. cit.*, p. 10.

²²² Otto BAUER, « The question of nationalities and social democracy », *op. cit.*, p. 8.

²²³ *Ibid.*, p. 8.

diversity going to limit the EU from a higher degree of cultural understanding and cooperation? And when we consider «sharing a common faith» How could one ignore the results of the 2001 Eurobarometer²²⁴, which states that European citizens (EU-15) are far from trusting in a prosperous common future. Only 39 percent of the poll participants have confidence on the EU²²⁵.

Today, English does not represent a substitute for national languages at a national level, «the question of language is at the heart of socio-cultural resistance to homogenization and is a major factor in explaining the failure to succeed in creating a pan-European televisual market via direct broadcasting satellite»²²⁶. What English represents is a valuable language of service, and should be taken just for what it is: an excellent opportunity to improve communication at the heart of the EU, nothing more, nothing less.

A European Communication Space, is it possible?

Even if this dissertation focuses on audiovisual production and specifically the role of television, the idea of a European communication space is relevant. Without the pretension of being exhaustive, this brief sub-chapter explores the idea of a European Communication space.

At the heights of the EU political circles, and especially before the failure of the Treaty establishing a European Constitution, there existed a clear disposition to construct a more politically-active Europe²²⁷; a Union that could represent a

²²⁴ European Commission, *How Europeans see themselves — Looking through the mirror with public opinion surveys*, Luxembourg, office for official publications, 2001.

²²⁵ *Ibid.*, p. 56

²²⁶ COLLINS, « Television: policy and culture », in P. SCHLESINGER, «Wishful Thinking: Cultural Politics, Media, and Collective Identities in Europe », *op. cit.*

²²⁷ As asserted by Olivier DUHAMEL, ex European Deputy and member of the European Convention, in the conference « La constitution

real counterweight to the USA. For Phillip Schlesinger, the Iraq crisis demonstrated that «Europe could not respond as a true Union»²²⁸. Rumsfeld's declarations on the *old* and *new* Europe are illustrative on the division of the euro-polity. In spite of political divisions, national Public's opinion in regards to the Iraq crisis was remarkably homogeneous. National public opinions throughout Europe seemed to agree in rejecting a military intervention. For optimists, this generalized rejection was the «birth of a European public space [...], at least on questions of war and peace»²²⁹. But even if public's reaction against the war in Iraq were more or less present in all European member states, at the end, Europe faced the crisis as an unarticulated mosaic of nations. Some member states continue to be present in Iraq with troops, some others have changed their positions like Spain and Italy, and others continue to be opposed, like France.

National vs. EU's communicative spaces

Even if it is often affirmed that «the communitarian construction has eroded member state's sovereignty»²³⁰, nations can not be yet suppressed from the equation. Nation-states in Europe experience: «pressure from above (in the form of the European Union with its goals of economic and political integration) [...] and from below (with secessionist tendencies in several states) »²³¹, and even under this pressure, the nation-

européenne à l'épreuve du référendum», *Les Midis de l'Europe*, Geneva, May 10, 2005.

²²⁸ Philip SCHLESINGER, « The Babel of Europe?: An Essay on Networks and Communicative Spaces », *op. cit.*, p. 3.

²²⁹ *Ibid.*, p. 3.

²³⁰ Philip SCHLESINGER, « Changing spaces of political communication: the case of the European Union », *Political Communication*, Vol. 16, 1993, p. 263.

²³¹ Philip SCHLESINGER, « Wishful thinking: cultural politics, media,

state continues to be the frame for the possible creation of an alternative communicative space. In consequence, the European construction is still tributary of national communicative spaces; the Union's evolution has an obligated passage through national medias and national political classes.

For David Held, who diverges with the Habermasian conception of Europe's communicative space, there is not a single public sphere; but «overlapping networks of interaction»²³². This definition efficiently targets the dynamism of the European space.

However, if it is true that a European space of communication is far from being born, the emergence of new communicative spaces at the European scale is today a reality. «The public sphere is no longer equated with the boundaries of the nation-state. The emergent euro-polity has developed an important space for a supranational elite policy community to operate»²³³. But even if a growth of pan-European media is noticeable; the Financial Times, EuroNews and Arte, «work to sustain restricted elite space rather than to herald generalized access to communication by European publics»²³⁴.

The absence of a wide European public, in plain possession of a European public sphere, is in direct relation with the so often denounced *democratic deficit*. Therefore, as long as Europeans do not have a public sphere where they can engage in a true European debate, the democratic deficit (and the resulting lack of citizen engagement) will continue to be present. Overall, it would be non-realistic to say that the actual state of European

and collective identities in Europe », *op. cit.*, p. 9.

²³² David HELD, « Democracy and the Global Order: From the Modern State to Cosmopolitan Governance », in Philip SCHLESINGER, « The Babel of Europe?: An essay on networks and communicative spaces », *op. cit.*, p. 10.

²³³ Philip SCHLESINGER, « Changing spaces of political communication: the case of the European Union », *op. cit.*, p. 263.

²³⁴ *Ibid.*

communication could lead directly to a single European public sphere.

Finally, if an incipient European communication space exists, it is reserved mostly to political and economic elites; European mass consumption is characterized by a strong American influence; but can one go as far as to affirm that there exists more cultural affinity between European nations and the USA than among European nations? This question goes beyond the limits of this analysis but establishes a good basis for a deeper exploration of the actual status of the European communication space.

SIXTH CHAPTER

European television regulation

The EU's regulation of the audiovisual sector reflects the eternal paradox of the European project. On the one hand there are economic interests, which demand liberalization in order to achieve market efficiency. On the other hand, there are the main principles of the European construction: the defence of European culture in all its diversity. A wild liberalization, say *dirigistes*, will only worsen the dependence on American audiovisual products. A liberalization, period, is vital for the mere chance to be able to compete on the international market, retort representatives of economic power. The resulting regulating set of policies of the European Commission (EC) reposes on this conflict.

The founding Treaty of Rome of 1957 shows no clear competence for the EU to intervene on cultural affairs, the Commission has been able to work under an economic angle (through Competition Law) to construct an authentic cultural policy often used to justify protectionism. As stated before, television was believed to play a key role in the achievement of a better European integration. In the decade of the Eighties, audiovisual products somehow seemed to hold a magic formula for cultural convergence and the political legitimization of the European project. The encouragement of production, diffusion and protection of audiovisual goods became a mission for the EC.

A protectionist set of policies were created on the postulate that the quantitative augmentation of non-European programmes on European television would mechanically produce a *cultural deficit* for Europe²³⁵. With the explosion in the number of television channels came the need for programme to

²³⁵ Pascal MARCHETTI, *La production d'oeuvres audiovisuelles dans l'Union Européenne*, Paris, Economica, 1997, p. 99.

fill programming spaces; the dependence on American audiovisual products became even more evident. EC policies are in contradiction with the interests of the European audiovisual market. To create an efficient market requires strong producers and broadcasters that are able to compete internationally; but yet, these broadcasters are forced to buy a quota of expensive European audiovisual products and limit their acquisition of better quality²³⁶ and less expensive American products. Behind the attitude of the EC has always been the assumption that European audiovisual production is superior in quality because it represents European culture²³⁷ but it would be interesting to analyze case by case. Some programmes, in spite of being *très* European, lack in quality and are not superior artistically to American programmes. In general, American programmes are considered a cultural threat by their artistic mediocrity and their industrial standardization²³⁸.

The Maastricht Treaty (1992) included a special mention for the audiovisual sector. «It encouraged the Union to take cultural aspects into account in its actions concerning the audiovisual»²³⁹. As a result, a set of policies and programmes were created.

Quotas, MEDIA, AECTV, EURIMAGES and EUREKA audiovisual

Under the TWF directive, a series of quotas were created in order to establish a majority of air time to European productions.

²³⁶ At least technically superior productions, due to the fact that content quality is subjective and difficult to measure.

²³⁷ Pascal MARCHETTI, *La production d'oeuvres audiovisuelles dans l'Union Européenne, op. cit.*, p. 100.

²³⁸ *Ibid.*, p. 101.

²³⁹ Mark WHEELER, « Supranational regulation, television and the European Union », *European Journal of Communication*, Vol. 19, No 3, 2004, p. 352.

France for example, established a 60 percent²⁴⁰ quota of productions from the EU. The Quota system of the EU (50 percent) became effective October the 1st, 1989. This measure was intended to support European producers, hoping that they would become more competitive against big extra EU exporters. The result was that the policy opened the European market internally for big European producers and shielded it to the exterior by establishing quotas. The danger of this pernicious policy is that by invoking the protection of cultural diversity, the single market was opened to powerful producers of big countries and imposed the costs to small European countries. The same danger of acculturation that was denounced by Europe in relation to the USA was forced on small member states by their powerful fellow members. Additionally, there exists a positive role of imports on small countries, who use profits from relatively cheaper American programmes (that attract higher audiences) to finance the production of programmes in national languages (that otherwise could not be financed). In these cases it is dangerous to justify industrial policies on cultural basis. Why advance cultural arguments when one can only discern protection measures that benefit big European producers? The policy made no differentiation between national and non-national European productions. As a result, most of the quotas are filled with national productions (especially in big exporting countries like France and Germany). Therefore, if cultural promotion was to be pursued, and the will to incentive countries to get to know 'other' European cultures was real, why not establish a fraction of this majority to be European but non-national?

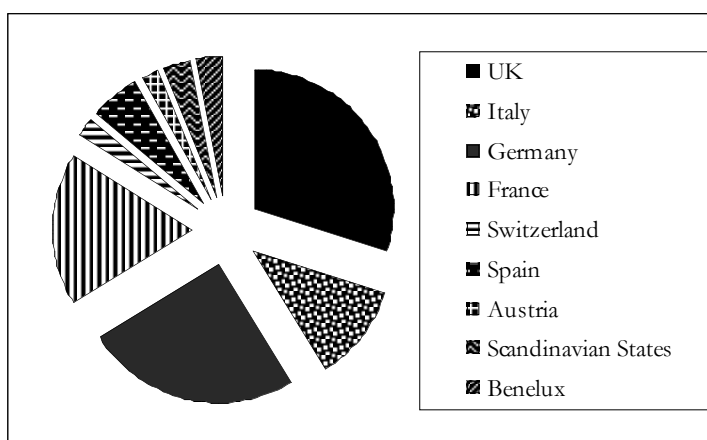
From an economic standpoint, protectionism would only aggravate the problem. To cover quotas, small countries need to buy more from big European exporters. This creates an inflationist environment, and makes budgets of small broadcasters explode, which consequently decreases even more existent national production. Finally, « *C'est l'intérêt*

²⁴⁰ Decree 90-66 on January 17, 1990.

*économique de l'Europe qui est privilégié au détriment des petites industries audiovisuelles, c'est-à-dire de l'identité nationale des petits pays européens»*²⁴¹. This violates one of the most important principles of the founding Treaty, which is the *No* discrimination between member states, the audiovisual sector included. As stated previously, the quota system discriminates small countries in relation to big exporting countries.

A decade after the quota system started to be implemented, the results are clear. It is big and powerful countries who profit from it. According to graphic 13, the most important exporters to the rest of the EU are: UK in the first place, Germany in second place, France and Italy successively.

Graphic 13: Breakdown of the turnover of the 50 leading European media companies, in 2001



Source: European Audiovisual Observatory *Economy of the audiovisual industry Yearbook, 2002, No 32*, in Allison HARCOURT, *The European Union and the regulation of media markets*, Manchester, Manchester University Press, 2005.

²⁴¹ Pascal MARCHETTI, *La production d'oeuvres audiovisuelles dans l'Union Européenne, op. cit.*, p. 113.

Contemplated in the update of the TWF directive, the quota system will no longer be used as an instrument to achieve cultural diversity in non-linear services. The new updated directive will only demand EU member states to ensure that providers of non-linear services promote access to European works where this is practicable, but the EC asserts that it trusts the dynamics of the industry²⁴².

Distribution at a pan-European level can not do miracles; producers should be efficient enough to export internationally. Protection to the audiovisual industry has the same effects as protection in any other economic sector. It rewards inefficiency; companies capable of exporting end up paying the consequences and talent is driven away. Having a captive and protected single market will not redress the state of the deficit. Language and culture barriers should not be underestimated; universal subjects and above all quality should be pursued when producing for export; for this constitutes one of the key advantages of American programmes and movies. This does not mean that quality must be bargained, but there should be a fairly amount of *popular* productions that can be followed by anyone throughout Europe. Quotas and protective measures «will only change the nationality of television pulp»²⁴³; instead of the American television show 'CSI Las Vegas' there will be France's «R.I.S» which is not better. European productions are not invariably a synonym of quality.

²⁴² European Commission, Information Society and Media, « Promoting cultural diversity in audiovisual media », available at: http://europa.eu.int/comm/avpolicy/regul/regul_en.htm, consulted on January 2006.

²⁴³ Josef Joffe, « Protection isn't a workable remedy for Europe's audiovisual deficit », *International Herald Tribune*, Wednesday March 22, 1995.

Media

Along with repressive measures (quotas), the EC developed support programmes, in order to encourage European audiovisual production of quality. One of these programmes was the MEDIA Programme (MP), launched in 1987. MEDIA was intended to correct distortions of the market and compensate the unequal battle between big European exporters and small member states. The official objectives of the MP are: «to preserve, promote, and widen access to Europe's cultural diversity and cinematic heritage and at the same time to upgrade the commercial performance of Europe's audiovisual content producers»²⁴⁴. MEDIA I was launched in 1987 and was expected to create a new and solid network of professionals of the audiovisual industry from a nationally fragmented European industry. This reorganization of the market from the very foundation would allow the development of synergies. The MEDIA Programme partially supports productions that have other means of financing, in this way, MP does not substitute investments, it only stimulates them. As a catalyst, the MP does not finance more than 50 percent of the value of the project and only up to 75 percent on training and education. MP does not interact directly on the production mechanism, the programme functions in terms with the subsidiarity principle. It only acts in areas where national aid is absent²⁴⁵. Under the MP, were born other projects like SCRIPT, which was a support to pre-production, and BABEL which was a support for translation. It is very difficult to measure the real outcomes of the MP. Experts say some time should pass in order to be able to evaluate, and even then, the creation of networks and the relations built between professionals are very difficult to measure.

After the relative success of the MEDIA I Programme, MEDIA II was created to be effective from 1996 to 2000. With

²⁴⁴ *Ibid.*

²⁴⁵ Pascal MARCHETTI, *La production d'oeuvres audiovisuelles dans l'Union Européenne, op. cit.*, p. 314.

a budget of 310 million of ECU's, it exceeded by far the budget of MEDIA I which was only 200 million of ECU's. Only 24 percent of this budget was financed by the EU, the rest was a contribution from national governments and private investment. From 2001 to 2005, the programme MEDIA Plus took the relief. This programme benefited from an increased budget of 400 millions of Euros, which seem insufficient for the EU-25. In an official bulletin, the Commissioner for Information Society & Media, Viviane Reding declared that «following the enlargement of the EU, the European Commission has proposed to double the MEDIA budget»²⁴⁶, which was finally not feasible given the tension that surrounds the negotiation of the Budget for the enlarged Europe.

Overall, the MEDIA project is more efficient than other measures like the quota system. It only supports rentable projects and does not substitute private investment, which is important from an artistic and economical point of view. It creates a network of professionals, and even if results are hard to determine, the investment constructs an industry that is able to develop synergies in the long term. From a neo-classic economic point of view, any support policy is better than protectionism. Support measures tackle the problem directly and do not create pernicious distortions in the market. Finally, from a cultural point of view, the MP is very positive due to the fact that the *quasi* totality of the supported productions would not have existed in spite of being rentable. Small countries, especially from Eastern and Central Europe can benefit from support to give an impulsion to their audiovisual industries and join the European industry's synergy.

Along with MEDIA, the *Année Européen du Cinéma et Télévision* (AECTV) was created in October 18, 1987. This programme selected 100 projects to participate, and granted 50 of them financing by national governments. There was as well

²⁴⁶ European Commission, Information Society and Media, « Promoting cultural diversity in audiovisual media », *op. cit.*

the creation of several prizes like the Geneva Prize, Galileo and Nike.

EURIMAGES & EUREKA

EURIMAGES was adopted by the European Council in October 1988 and started to work in 1989. In 1990 it was opened to countries from Eastern and Central Europe. Since EURIMAGES was limited to cinematographic and documental projects not intended for television this study will not explore it.

Finally EUREKA, which is one of the most recent programmes was implemented in December of 1995. This program was launched by François Mitterrand, who alleged that «without a European reaction the immense majority of the television programmes will come from USA and Japan»²⁴⁷. The biggest success of this programme was the creation of the European Audiovisual Observatory, which centralizes economic and judicial information regarding the audiovisual industry. In addition to that, more recently the main mission for the EUREKA Programme has been to act as intermediary between EU audiovisual programmes and countries (now new members) from Eastern and Central Europe.

Television Without Frontiers (TWF)

The decade of the Eighties brought drastic changes for the world's audiovisual market. Technological advances, cross-sectorial convergence and the globalization of communication services, transformed the media market in Europe and in the rest of the world. New elements were brought into the picture and existing companies merged and created powerful alliances. Many acquisitions took place, and European companies seemed not yet

²⁴⁷ Pascal MARCHETTI, *La production d'oeuvres audiovisuelles dans l'Union Européenne*, op. cit., p. 324.

to be ready to compete in this new environment. The European Commission decided to intervene. The liberalization of the European market was the response to the new commercial and technological challenges. This liberalization allowed European markets to open at a pan-European level. This reasoning was in clear concordance with the creation of Europe's single market, which was in implementation at the moment.

The EC conceived the directive Television Without Frontiers in order to create a competitive audiovisual market in Europe. The spirit of the directive was to liberalize and harmonize European television. Two main objectives were set. One, to harmonize the nationally fragmented European audiovisual industry, making it capable to compete in the international market, especially against American producers. The other, to safeguard of the core values of the European project: freedom of expression and cultural diversity. In the new and improved audiovisual market, ideas and images would flow freely showing Europeans their mutual resemblances and cultural affinities, an objective that, incidentally almost twenty years after has not been crystallized. In addition to this, it has been by no means determined that the consumption and flow of audiovisual products produces cultural effects; this assumption is what Phillip Schlesinger calls «The fallacy of distribution» and can be explained as follows: «a causal connection—is drawn between the workings of mass media and the creation of a European Identity, [...]and that the transmission and consumption of television programmes was held to be identity-conferring»²⁴⁸.

In 1989 the TWF directive was created as one of the most important liberalizing directives of the history of the EU. TWF «defined television signals as services, entitled to free movement on the single market»²⁴⁹. The great challenge was to address

²⁴⁸ Philip SCHLESINGER, « Wishful Thinking: Cultural Politics, Media, and Collective Identities in Europe », *op. cit.*, p. 10.

²⁴⁹ Allison HARCOURT, *The European Union and the regulation of media markets*, Manchester, Manchester University Press, 2005, p. 9.

technological changes, especially the arrival of satellite television. The directive was very important economically speaking because it meant the stimulation of a high potential industry.

In 1993 Jacques Delors wrote a paper on «Growth, competitiveness and employment». In this paper he identified the media market as one of only three sectors expected to produce future job growth. Therefore, there were not only cultural issues at stake, but also the creation and survival of millions of jobs that produced not just regular goods, but culturally charged goods²⁵⁰.

TWF regulates under the principles of co-regulation and self-regulation. Between its principal areas of influence are: advertising, sponsorship, a minimum quota of broadcasted independent programmes, among others. To cite an example, a daily 15 percent was determined as a maximum of advertising air time and a maximum of 20 percent during peak schedules²⁵¹. This was modified with the modernization of the policy in 1997 and percentages were increased to 20 percent at any given hour; a quota of 10 percent of air time was also established to benefit independent productions. A clearer definition as to what is *European work* was determined; this changed in 1997, broadening the definition to co-productions with third countries (if the majority of the financing was made by a European producer). The public right to reply and the protection of minors and human dignity were also reinforced.

In 2005 the EU launched a proposition to update TWF. According to official declarations from the Commissioner for Information Society & Media, Viviane Reding, even though revised once in 1997, many of the updates have been overtaken by technological progress and market developments. The key issue that regulators need to address today is that rules devised for one-to-many broadcasting are being rendered obsolete by the

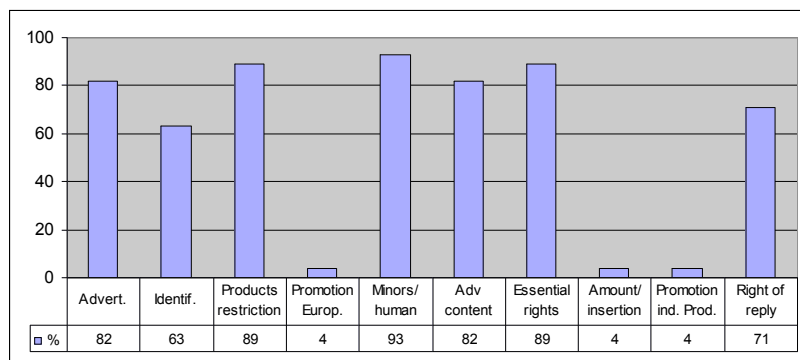
²⁵⁰ *Ibid.*, p. 10-11.

²⁵¹ Mark WHEELER, «Supranational regulation, television and the European Union », *op. cit.*, p. 355.

shift to one-to-one on-demand services. The new modernized TWF directive defines rules for audiovisual services as such and not for the technology that delivers them. The Commission’s proposal distinguishes between linear services which *push* content to viewers and non-linear services where the viewer *pulls* from a network. Non-linear services would be subject only to a basic set of minimum principles, e.g. to protect minors and prevent incitement to racial hatred²⁵².

On demand services are being specially targeted by the modernization of TWF; today they are mostly regulated by the EU’s eCommerce Directive. It is important to say that this improved directive will complement other directives, especially the eCommerce one, which will continue to apply. Following graphic 14 shows which aspects of non-linear services are currently regulated by EU member states.

Graphic 14: Regulation of non-linear services



²⁵² European Commission, Information Society and Media, « Why Europe needs to modernize its TV without Frontiers Directive », available at: http://europa.eu.int/comm/avpolicy/regul/regul_en.htm, consulted on January 2006.

Convention on the Protection and Promotion of the Diversity of Cultural Expressions

In October 20th of 2005, UNESCO members massively approved the «Convention on the Protection and Promotion of the Diversity of Cultural Expressions». Even if this convention is not exclusive to the EU, this analysis will explore it for the importance it has internationally and for the fact it was launched by France and Canada and fully backed up by the EU. Even the UK, that abandoned UNESCO in 1984 with the USA agreed to disagree with its powerful ally; The «UK's ambassador to the summit, Timothy Craddock, proclaimed it ‘a great day for UNESCO’ on behalf of the EU, saying that they had *agreed to disagree* with ‘one country’ on the matter»²⁵³.

The convention defends the idea of equality between cultures, regardless if countries are rich or poor. In order to escape from cultural homogeneity and cultural enslavement, the differentiation of cultural products is imperative. Cultural goods and services, says the Convention, «must not be treated as ordinary merchandise or consumer goods»²⁵⁴. Culture products must be shielded from wild liberalization.

Cultural imports, especially from the USA are considered as a threat and their massive presence in Europe explains this fear. Hollywood accounts for about 90 percent of box office in Europe and 65 percent in France²⁵⁵.

Under heavy American protests and in spite of the intervention of one of the most powerful lobbies in the world: the Motion Picture Association of America, the convention was approved: 148 votes in favour, 2 votes against (USA and Israel) and 4 abstentions. Condoleezza Rice expressed her deep concern

²⁵³ BRIDGES, « UNESCO Overwhelmingly Approves Cultural Diversity Treaty », *Weekly Trade News Digest*, Vol. 9, No 36, available at: <http://unesdoc.unesco.org/images/0014/001403/140318e.pdf>, consulted on October 2005.

²⁵⁴ Alan RIDING, « A global culture war pits protectionists against free traders », *The New York Times*, Monday February 7, 2005.

²⁵⁵ *Ibid.*

about the result of the convention and warned: «will only undermine UNESCO's image and sow confusion and conflict rather than cooperation»²⁵⁶.

At the end of the decade of the Eighties after the creation of the TWF directive, the USA protested; Carla A. Hills, US Trade Representative for the Bush Senior administration declared in May 1989: «The Single market of 1993 is used as a pretext to build a European fortress»²⁵⁷. Fifteen years later, Louis Oliver, US Trade Representative for the present Bush administration denounced the same protectionist tendency and warned that the Convention is «open to misinterpretation, arguing that it threatens the free flow of ideas and could even be used to justify government censorship, particularly against ethnic minorities»²⁵⁸.

An important change proposed by this convention is the fact that trade disputes involving cultural products should in the future be ruled by the UNESCO Convention and not the World Trade Organization. One of the dangers of this text is that it leaves a breach in the definition of cultural goods. Products like wine, coffee, textiles could be declared as cultural products, and consequently be entitled to receive protection.

It is still unclear what consequences this convention will bring in terms of trade deficit and if it will really change transatlantic audiovisual trade. Given the fact that no punitive mechanisms were established, it is not expected to be widely enforced. Is there a place for protection of culture in an already global audiovisual market? The most important risk for this Convention is that of being forgotten. If the USA does not sign it, it will probably be condemned to the same fate as the Protocol of Kyoto or the International Criminal Court. If this convention has any consequence it will be mostly symbolic. It

²⁵⁶ BRIDGES, « UNESCO overwhelmingly approves cultural diversity treaty », *op. cit.*

²⁵⁷ *Ibid.*

²⁵⁸ *Ibid.*

fundamentally «pushed back the idea that anything comes under trade rules»²⁵⁹.

²⁵⁹ *Ibid.*

Conclusion

Television is the first truly democratic culture - the first culture available to everybody and entirely governed by what the people want. The most terrifying thing is what people do want.
Clive Barnes

Europeans spend 43 percent of their free time watching television, what constitutes an average of two and a half hours per day²⁶⁰. But even if it is true that television is today the principal vehicle of mass communication and popular culture, it has also been demonstrated that it is not a magic formula and does not exercise the expected influence over European citizens.

A voluntaristic approach

For decades, a top-down-voluntaristic approach has characterized the audiovisual policies of the Commission. A connection was made in the Eighties between the consumption of media products and the creation of a common European culture. Inspired on this premise, the Commission conceived the television Without Frontiers directive. This directive was trusted with two main missions. One was economic and consisted on rendering the audiovisual industry of the continent more competitive and capable of competing with American imports. The other mission was cultural and consisted on accomplishing of a more profound European integration.

Given the fact that the size of the American market is in part responsible for the success of US producers, it was easy for European eurocrates to presume that a market comparable in

²⁶⁰ European Commission, *How Europeans spend their time, everyday life of women and men*, Luxembourg: Office of publications, 2004.

size would have the same effect in Europe. Brussels decided then to open the single market to powerful European producers; by decentralizing and opening the market, the Commission expected to incite European producers to become more competitive. As exposed in this dissertation, the TWF directive did not count on Europe's diversity and the resilience of national preferences. As a result, the directive not only did not produce the expected cultural and economic results, but increased Europe's dependence on American productions. Culturally speaking, instead of integrating Europe as intended, the directive opened the European market to the extremely competitive American entertainment machine. American producers were present and ready to take the chance to dominate the market.

In the constructed antagonism that opposes Europe and the USA, two visions of cultural economy are confronted. «For the USA, audiovisual trade is just a business whereas for Europeans it is both a business and (when convenient) a cultural matter»²⁶¹.

The Commission has conducted an authentic cultural policy long before the treaty of Maastricht gave it the competence; and the TWF directive was just the beginning. The Commission's chimerical fixation on the cultural integration of Europe and the advent of Europeanness is based on the «techno-utopia of overcoming European cultural diversity through market (and technological) forces»²⁶². The Commission has practically attempted to enforce internal colonialism by means of audiovisual production and consumption. Betting on the audiovisual sector as an influent agent, the Commission expected to awake a European consciousness.

In spite of the disappointing results of the TWF directive, the technological determinism and voluntaristic approach of the Commission continues to be flagrant; for example, in the programme: «Information society», through which, the creation

²⁶¹ Philip SCHLESINGER, « From cultural defense to political culture », *op. cit.*, p. 375.

²⁶² *Ibid.*, p. 378.

of a *European information area* replaced the will to create a *European audiovisual space*.

Another example, of what the future reserves (in terms of initiatives) to achieve a better European integration is: Plan «D»²⁶³, D for democracy, dialogue and debate. The commission prepared this plan on the «White paper on a European communication policy», published on February 2006. This plan envisages the reinforcement of «Europe by satellite»: a device that will provide live images from EU's institutions to television channels. Defined by the white paper as a «considerable effort to improve the way they (institutions) interact with the media»²⁶⁴ and to «ensure that the press is informed of key decisions in real time. 'Europe by Satellite' supplies video, sound and images to the media on behalf of the three main EU institutions, and the European Parliament plans to open itself up to the public via web television»²⁶⁵.

From broadcast to narrowcast

Another major change in the way the world watches television is the shift that is occurring nowadays, in which consumption switches from broadcast to narrowcast. This metamorphosis will most likely benefit (in the medium term) the development of regional-theme projects that will target a trans-national public sharing a vehicular language and socio-economic traits. This will result in a more efficient fragmentation of the market. For new channels in the near future, «internationalization will become economically indispensable»²⁶⁶.

²⁶³ 'D' as an irony for the absence of plan 'B' announced by the French when refusing the Treaty establishing a European Constitution.

²⁶⁴ European Commission, « White paper on a European communication policy », *op. cit.*

²⁶⁵ *Ibid.*

²⁶⁶ Jeremy TUNSTALL and David MACHIN, *The Anglo-America Media Connection*, *op. cit.*, p. 62.

Mass broadcasting or the one-to-many television supply is being supplanted by one-to-one or a more individualized consumption (due to technologic advances). This new and individualized way of watching television is seen by the Commission as an opportunity. Cultural diversity in the continent passed from being a barrier for inter-European media exchange, to an opportunity to be seized. «The new magic formula seems to be: digital compression plus euro-heterogeneity equals profitability, thus ensuring global competitiveness»²⁶⁷; but what the Commission seems to overlook is that more channels do not mean more diversity. To fill grills of programming, new channels will recur to American cheap material. This will surely not contribute to raising the competitiveness of European producers. The European audiovisual market does not need more small companies that struggle to be visible in the market. Europe is in need of concentration movements that produce big and competitive producers who are able to create important synergies, and above all that are capable of exporting to the world and not just to the single market.

The future

In the future, a deeper economic integration will be fundamental in order to improve the economic vitality of the single market. In the case of the audiovisual market, a greater concentration is an obligated passage for European producers to be more competitive.

Moreover, the «absence of political and social solidarity could undermine Europe's efforts to remain globally competitive»²⁶⁸. But if one day, a better European integration is achieved, and a certain form of continental solidarity

²⁶⁷ European Commission, «Follow up to the Green paper on Pluralism and media concentration in the internal market», in Philip SCHLESINGER, *op. cit.*, p. 380.

²⁶⁸ Cris SHORE, *Building Europe: The cultural politics of European Integration*, London, Routledge, 2000, p. 20.

(Europeanness) emerges, it «will probably have to be rooted in a gradualist saga of growing together through institutional sedimentation in the long term rather than the quickie product of technocratic rationalism»²⁶⁹. What it is most probable is that a deeper integration will not come from the cultural sector, «*les cultures européennes sont non seulement diverses mais aussi relativement imperméables les unes aux autres: les publics européens ne s'intéressent pas aux produits culturels de leurs voisins et aucune intégration ne semble s'amorcer à ce niveau*»²⁷⁰.

Incipient European publics are elite publics. Interest in cultural products of other member states is only present among the culturally privileged and not in the majority of the population. Nations and its specificities in Europe are here to stay. After decades of proclaiming the existence of a latent Europeanness, some seem to have finally accepted to renounce to this idea. On the celebration of the 250th Mozart's birthday, celebrated in Salzburg, Dominique de Villepin asserted: «*C'est dans le cadre des nations qui s'exprime l'identité des peuples et leurs aspirations. L'Europe doit, donc prendre acte de ce mouvement et préserver la place des nations, tout en évitant les pièges des nationalismes. C'est là le défi*». He also affirmed that «*il est le temps de construire un nouveau chapitre de l'histoire de l'Europe, celui des peuples*».

What can be considered to be one of the most important messages of this analysis is the fact that one cannot possibly think about transnational and pan-European television outside a broader globalization process. And unfortunately, on this subject, political elites seem not to be ready to change their old ways. Dominique de Villepin also declared in Salzburg that «*l'Europe risque de perdre sa spécificité devant la globalisation*». This declaration illustrates once again the inwardness of a political

²⁶⁹ Philip SHLESINGER, « Tensions in the construction of European media policies », *op. cit.*, p. 98.

²⁷⁰ Jean K. CHALABY, « L'adaptation des programmes européens aux marchés nationaux. L'exemple d'Eurosport en Grande-Bretagne », *op. cit.*, p. 241.

class that perceives globalization as threat and not as an opportunity. Europe should not be considered as a potential safe heaven, where industries can be protected from outside competitors in the name of cultural diversity. The American entertainment machine is well positioned in almost every market and, in plain possession of a structure that enables producers to adapt price strategies tailored to different markets. What eurocrates in Brussels seem to ignore is that globalization is a window of opportunity open for Europeans as well as for Americans; trying to shield the single market from American imports will only generate European imitations of already successful formats. Europe has a lot to offer: an inexhaustible source of talent, a cultural heritage that goes beyond the wildest imagination, and a deeply rooted infatuation for the arts (that has characterized the continent for centuries). The problem is that culture does not sell autonomously. European producers have to sell it to the world. If the EU wants to lend a hand, it definitely needs to adapt its strategies, from a defensive approach, to a market-competitive approach.

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