Skinwell ha etrekuzuladen
E Breizh Galicia bro Cembre

Televisión e interculturalidade en
Bretaña, Galicia e País de Gales

Teledu a rhyngddiwylliant
Yn Llydaw Galicia a Chymru

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SKINWELL HA ETREKUZULADEN E BREIZH GALICIA BRO CEMBRE

TELEVISION E INTERCULTURALIDADE BRETAÑA GALICIA WALES

TELEDU A RHYNGDDIWYLLIANT YN LLYDAW GALICIA A CHYMRU

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INTRODUCTION

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There is a fine line that is drawn by the construction of Identity, that links the lesser used languages and Public Broadcasting services, in this case of Brittany, Galicia and Wales, in the awareness of multicultural Europe. This is a sign of our times, when the information technology and telecoms industries meet the programme content suppliers, and so establish the terms of convergence that underlie new models of competition. Such new models seek to recover the ethical components, social components rather, in the fields of production, dissemination and consumption of symbolic assets; as well as to further co-operation between academic researchers and professionals of the audio-visual field.

Our work then follows this fine line, from a holistic approach that looks at the diversity of models by which our countries are represented, at the diverse television policies as regards public responsibilities and production and distribution activities, and at the state of realisation of Identity. Concrete actions may be derived from the above, both in terms of time and space, now that the way to understand the European audio-visual space is changing dramatically.

For the first time the concept of 'cultural and linguistic diversity' became associated to the idea of Program, appearing unto us as a material advantage, as a market asset. It also provides a way to define the public and what may be of public interest. The concept of diversity in Europe, expressed in terms of its peoples, its regions and overall cultural mosaic, carries forward proposals to foster production and distribution of audio-visual output, designing strategies around the factotum that we call competition, ever present in any open discussion about Identity.

Older paradigms have proven to be of little use, and the structure of modern States barely resists the integration of territorial variances that are essential to audio-visuals in a globalising world. The desideratum of a single market by means of implementing USA-type standards having failed has taught us not to limit ourselves to analysing the symptoms by their causes. Nor do we trust what is publicised as profitable by a simple, contingent process of accrual: border suppression, deregulation, the fall of the Berlin wall, increased corporativism Vs declining collective spirit; all of which have coincided in time with what has been called the logic of telecommunications .

Thus the need arose to speak in the plural. To speak of imageries. Of markets. Of territories and of the political audio-visual agents. The discussions and responsibilities leading to decision-making in the sector tied the political and administrative institutions to the world of business, and so economic issues and cultural notions started hybridising. Academics, especially in Public Universities, may no longer sit back and watch comfortably. Training has now proven to be of essence, such as was expressed by Commissioner Joao de Deus Pinheiro in July 1994 to the participants at the European Audio-visual Conference . The latter event contained the seed of a new era that brought about MEDIA II in 1996, where noteworthy proposals are expected to issue from, both during the oncoming Conference on the Digital Age , called for by the British Government when it started its round of Presidency of the Union, and in the outcomes of the Top Level Reflection Group working under the auspices of DG X for the convergence of Europe's programme content industry. The role of government instances before the industrial and cultural challenges is also addressed, as did Mr Oreja's speech at the 9th Forum of Television and Cinema in Europe (EIM-Lisbon, Nov. 1997), to recognise the importance of public interest and ethical considerations within this new audio-visual context.

Until then the concept of 'cultural exception' had been considered a mere defensive slogan, surely conceived for a transitional period in light of the poor capacity of European production to meet the demand and redress the absolute dominance of *Major*. It now became the core of a gradual discussion where emerging spaces for communication appeared as a part of European policy, with manifold representations, even minimally as a 'mosaic of languages and cultures'. Meanwhile, the new concept of audio-visual production and consumption as being unalienable elements of identity, a concept used also to justify commercial viability, is replacing the stubborn, scarcely operative idea of an eclectic, aseptic European global market with an aftertaste of Europudding. We approach the complexity of the phenomenon freed from the excess of bias that forestalled previous discussions, and we are now encouraged to further actions within its own context, that is national and trans-national.

The corpus for analysis of 'Television and Interculturalism , Brittany, Galicia and Wales' shall focus on audio-visual production and distribution, looking at aspects such as quality and professionalism. In the title, however, we have chosen to concentrate the three angles from which we see ideas for the future: the national, the exchange of content and the existence of public broadcasters.

With 'Television and Interculturalism ' we started the countdown for an experience issuing from the I Congress of 'Communication in the Atlantic Periphery' (Santiago de Compostela, 7-10 November 1995), that later materialised into the first joint project by the three Universities: Haute Bretagne-Rennes 2, Wales Aberystwyth and Santiago de Compostela. This project involves national public instances from Brittany, Galicia and Wales, as well as superstatal instances, i.e. the DG XXII of the European Commission, that add on to its marked diversity.

This report has surveyed the state of production and broadcasting in each of the languages of these countries, seen from the different systems of public television and the priorities given to identity goals at each society, the latter being language in Wales, an own Public Television for the Media in Brittany, and co-production policy and developping independent mediatic authorities in Galicia and to play in the field of competition within the parameters of Information Society as well as to bring professionalism to programme production. The history studied thus differs in each case, as do the ways in which political and institutional representation is provided to each national reality: the Autonomous Parliament of Galicia, the recent Devolution process in Wales, functional decentralisation in the case of Brittany.

There are obviously many consistencies across the three countries: similar populations -between 2.5 and 3 million inhabitants- common aspects in folklore and morphology, as well as in their subsidiary role to hegemonic classes and social groups issuing from centralised power. In the 60's the idea of inner colonialism' was coined, no longer were emigration, the looting of resources and dismantling understood as having been fortuitous events. Thence came the organisation in crescendo of social and political movements: through awareness, the will became as well as the need to pursue this nationalitarian model, language being a key symbol for identity.

Furthermore, the imagery and memory from which the difference is construed, sometimes referred to as 'celtism', bring together in these three countries the ideas of freedom and otherness, essential to interculturalism. This is manifest and materialised in the very process of mutual relations, interfacing with parameters that establish one's position and the others', the very basics of communication. The signals must be recognised that issue from each beacon, and every move traced in order that our proposals, as they are different from one another, may engage in mutual relationships under expectations of reciprocity and not just similarity or assimilation.

The time has come to construct intercultural processes as another way to partake of reality, as it transforms into a simbolic arena that could be titled 'Atlantic Arc for Communication'. Cultures of roots that are Scandinavian, Celtic, Latin, having maintained contact over the seas, not only establishing common solar and lunar systems and common forms of self representation, but also sophisticated figures for language and register -here again ironically- that would be difficult to decode inside other cultural spaces. Mixed, nomadic, maritime cultures are those of Brittany, Wales and Galicia. The mermaid, the dragon, otherness -material and immaterial- incorporated to identity as an evolving historical process whereby the exchange of fiction and informative audio-visual production is made possible, the same way that the exchange took place in the field of music and literature, ranging all the way from cultural circuits and cinema festivals to television, and in doing so expanding freedom of expression.

Our basis for assumption, the 'fixed ideas' on which we found the terms for analysis and theoretical confrontation, is that television systems -whatever their broadcasting coverage, property and functions (public sense or commercial prevalence), and even their characterisation (thematic, generalist, pay or universal access)- follow the logic of economics, besides that of identity, when it comes to production, acquisition or exchange of programmes. This other level may thus not be forsaken, as they are active agents at the audio-visual marketplace, through production and distribution of programmes. The influences should be highlighted of cultural and linguistic policies on the communication policies of Brittany, Galicia and Wales.

Another basis is thinking in terms of these television systems differing from the mainstream, constructing models at State level. This is tantamount to questioning the globalisation of such State models and considering that 'small countries' television systems may have the chance to grow in a flexible, multiple formulation, leading us back to problems of identity and culture. It takes us from marketing to citizenship, and could be used as a trump in the struggle between the industry of Europe and North America. It leads us to consider the need to establish concrete strategies for production, multi-versions and distribution.

At the very beginning of the project, we became aware of the tendency to address the issue from a standpoint of ideology, culturalism or with an exclusively interpretational attitude. Nevertheless, we proposed to go into a deep quantitative analysis of the audio-visual sector, addressing the financial and business aspects, the evolution of production and employment, the importance of training and the prospects for distribution. The core goal of each case study -Breton, Galician or Welsh- is to describe within information science the evolution of the sector along a three-year period, with an outlook for the overall prospects in the European Union. The sector is expected her to grow by 70 per cent in the next ten years, and may go from 1.8 million jobs to 2.6 million, increasing production hours from 650 thousand to 3.5 million by the year 2000 -bearing in mind that through digitalisation, the number of channels shall increase from the current 120 to around 500. Comparative analysis may allow for setting the bases of discussion for effective distribution and co-production plans.

The role of Television itself, especially of public broadcasters -be they of a national/regional or even local nature-, in constructing identity and providing it with visible representation is not far from quantitative analysis. The role of television goes beyond political and territorial branding, coverage or own-culture based content production, as it ought also be a part of the generalist, universal access television that is to eventually represent 65 per cent of the European market and around which multimedia shall revolve.

There are no similarities between the models underlying each television of those studied, which tells us about the differences in the relevant general processes that brought about their inception. Whereas the French model sticks to the age of initial regionalisation, in the 60's, in both the Galician and Welsh cases the public televisions were born from parliamentary mandates in the 80's and their articles and programming principles provide for the defence, normalisation and cohesion of the national languages and cultures. Here again, the political formalisation is specific to the history of each country. In the case of S4C in Wales, it is that of a broadcaster, not a producer, that is supplied by independent companies: BBC, Channel 4 and HTV; in the case of TVG, 70% is own production, mostly consisting of flow programmes, but it is also supplied by other companies in the sector.

The basis for the quantitative analysis started from an overview survey that was conducted in the sector with many items for each category, receiving ample generic feedback -over 70% in Brittany and Galicia, around 50% in Wales. Many companies, however, found it difficult to respond to queries concerning business volumes or training and distribution policies. Closed-format interviews added onto the study to address key issues that concern all those involved in a process. This was the case for

Galicia, evidencing a great need for proper legislation and for more resources, usually disguised as subsidisation, seed capital, etc.. 'Television and Interculturalism in Brittany, Galicia and Wales' is the most representative of existing studies that allows for conclusions and recommendations that be in line with the principles of European audio-visual policies. Its prospective nature starts by identifying the problems to then draft a programme with which to reaffirm the co-operation of Universities, political and cultural institutions and professionals, both in training and in analysis and research, to overcome the stagnation that is holding back the potential for contemporary research in the field of Information Science.

The opportunity should not be missed of an observatory to monitor audio-visual productions in the three countries, together with some sort of an intranet to keep on line catalogues and information about the programme content industry. Concrete experiences of programme exchanges between the three broadcasters -France Ouest, TVG and S4C- should also be pursued and should be start by animation productions “Roger the Rooster”, “Os vixiantes do camiño” and the Oscar nominated “Famous Fred”.

All international Forums are addressing the issue of culture again. Culture is yet again approached as being a part and parcel of the economy of communication, as a basis for productivity. The field of meaning for Culture is extended to signify the collective memory that facilitates communication between the members of an historically established community. Thus the creation of content is made possible (expressive function), that relates to its environment (economic function), and is granted argumentational capacity for the implicit conventions in social relations (legitimating function), as per Aramand Mattelart's classifications in Communication/World. Culture, and the interaction of different cultures that bring meaning to one another through mutual contact. Meaning: the will between abstract and concrete, between awareness and experience, between subjectiveness and collectiveness.

The question must be raised again of Democracy between Cultures as an active principle to establish communication policies, at times of increasing alliances and mergers in the private side to programme content and distribution, ever more closely connected to the computers and telecoms industries. Any Network recalls ideas of webs and of secretiveness, of re-monopolised information and hegemony, and so we need to think about the institutionalisation of access to a rare resource: the media, the media through the discourse is constructed, the understanding of the world and the possible ways to change it. The need for public control over technological developments, as discussed in its day under DG XIII, involves public Television and that is why it becomes so urgent to redefine its role.

The liberal, historical, humanistic idea of television open to everyone, without discrimination against minorities, different creeds, races, social classes... Pluralistic Television, fostering a sense of citizenship to stand up against the reduction of persons to mere consumers, especially now that the growth of the audio-visual sector shall depend largely on the direct expenditure by the users, turning them into consumers. And so television shall enter into competition and play its human capital and archival assets, and work to improve the technology and contents, and so bring the rights of the collective subject called civil society to the heart of the multimedia industry. Because society today with the Media, from the Media and against the Media, builds relations of culture, political pluralism and communications.

Measures and policies that promote dubbing and subtitling, as well as multiple versions during production, are essential for all of Europe and especially urgent for minority languages. Whichever the situation of each language may be (why is Breton in danger, why does Galician suffer from linguistic policies that perpetuate linguistic diglossia and have not yet achieved to normalise the social use of the language), they are one of the cornerstones of the sense of belonging to a national community. This, in turn, never minding the degree of institutional formalisation of such a community. That is the reason for the support to research issuing from DG XXII**.**

In this panorama it is usually understood that a 'minority culture' is one that issues from a limited domestic market and does not achieve to position its production in the standard circuits, precisely because said production is in a lesser used language. In this panorama, that we adapt as we go, it is well known that access of television and audiences to such productions did not arise from market forces but from political lobbying. This was the reason for the laws passed in Spain -establishing the '3d channel'- or in the UK, governing S4C.

In this panorama, moreover, unique offers are to be reinforced, including 'proximity programming', that should not enter into conflict with 'identity programming', nor drift away from the notion of public interest: that being the first and foremost responsibility of publicly owned broadcasters as well as of the other agents that add up to the audio-visual panorama.

Interesting times for the coupling of Television/Identity, and for an ideology that came to act in due course upon the considerations adopted by the Council of Europe on June 17th, 1997 in Amsterdam, linking public broadcasting directly to the democratic, social and cultural requirements of any collective community as well as to the need to preserve pluralism in the media. Happy times when the coupling becomes a value for change, no longer considering it to be an archaeological relic but a valuable contribution towards multiculturalism in Europe. In these times the 'small countries' -small in terms of presence in the sector, not necessarily in size- should not become passively incorporated into the process of globalisation. They need to participate of the programme content industry, and achieve awareness as to their contribution to diversity, through the binomial that is established between the oncoming technological convergence and the shape that competition shall eventually assume. Between concentration, on the one hand, and the possible effective dissemination and exhibition of specific projects, on the other, projects that are recognisable because of their identity referentials, be they Neo-Realism, the Arthurian cycle, or the single-hero dramas of Ibsen or Kinoglaz. These times of ours when for the first time we have policy in our favour and the technology too, and maybe because many other forecasts failed, it has become the more evident that there is no single market in Europe, that there are many markets and so many forms of co-operation should be pursued. Old clich,s must be overcome, such as the limiting of public service strictly to information, to insist precisely upon the fact that fiction and entertainment are a very efficient, as well as profitable way to development identity in television.

We start from Breton, Galician and Welsh as languages that are to make themselves seen and heard through products designed for the Media, instead of by setting value indices in the number of speakers. We start from three very specific linguistic situations that may not be reduced to a single common denominator. And we start from public television: as a political requirement, as a market element and support for intercultural dissemination, as one of the ways in which to act locally in a situation that demands thinking in global terms.

As we stated at the beginning, 'Television and interculturalism: Brittany, Galicia and Wales' is set inside the general framework being drawn for the audio-visual sector in Europe, that of the political measures being discussed, and of the role of identity as part of public interest, from both the standpoint of regional differences and of nations without a stateless nations.

The detailed study in each case, the problems there presented and the need to deepen into anything that may relate to broadcasting and training all derive from comparative analysis. Experimental broadcasts of thematic blocks between France Ouest, TVG and S4C, such as musical or animation programmes, add on to the practical implementation of some of the conclusions.

In the world of University, we share the ideas of Prof. Tapio Varis, from Finland, who noted at the Congress 'Communication in the Atlantic Periphery that interculturalism, interrelationship, interconnections, and easy access to the information networks may only make sense for the small countries if they may also partake of programme content. And for the field of training, Prof. Varis recalls, a very european and relevant word that identifies the most decisive moments in the changes of everyday culture, Constructivism Vs Instructivism. It is thus a question of combining materials, ideas, communication spaces that play the game of a morbid imagery that floats on Atlantic waters when the material history of culture is portrayed on television, in the production and distribution structures that be Galician, Welsh and Breton.

THE BRETON CONTEXT

a. Introduction

Britanny is one of 22 French regions. It is also called a “province”. This highly connoted term came into use during the Jacobin tradition of the centralising State which, by whim of the developing policies of territorial organization, proceeded to administratively demarcate the land in a way that was often quite removed from its historical, social and economical reality. Thus, the historic Brittany, whose frontiers coincided more or less with those of the Duchy, which was independent until 1532, today comprises the five *départements* of Finistère, Côtes d'Armor, Ille-et-Vilaine, Loire Atlantique and Morbihan. The region is an administrative division which, since 1941, excludes the Loire Atlantique whose capital, Nantes, had in former times been the seat of the Dukes of Brittany. With respect to the denomination of Low Brittany/High Brittany, it follows partially the north/south divide that runs from Saint-Brieuc to Vannes, separating breton Brittany from French or Gallic Brittany.

It can thus be seen how the different limits of Breton territory give rise to some confusion only explained by the policies of economic and cultural development. If the idea of reunifiying historic Brittany attracts some who deem to be important the assertion of the Breton identity, others sustain that in the face of economic internationalisation it is preferable to argue in terms of a “harmonious confederation”, that is, to open Brittany up to the great west (to Mayenne and perhaps even to some *départements* of the Charentes-Poitou region), with the aim of fostering an economically favourable relationship[1].

The region has a population of 2.7 million inhabitants. If one adds that of the Loire Atlantique, the number of inhabitants ascends to 3.7 million and the great west now becomes an entity that holds between 4 and over 6 million people, depending on the extension chosen[2]

The development of new systems of regional television fits into this context, and is related to the issue of territorial demarcation coupled with a fragile equilibrium between cultural, political and linguistic identity and economic development.

b. The linguistic situation

There exist few studies that give a clear idea of the practice of Breton. The absence – until recently – of statistical data is symptomatic of the politics undertaken by successive governments in the field of minority languages: a negation of regional linguistic realities that has long remained unchallenged and which manifests itself in the refusal to draw up specific

[1] See Ivon Richard's article on the subject, "Nantes and the Breton Identity" in *Ar Men*, n° 91, January 1998.

school syllabuses or support bilinguism. Despite the numerous grey areas regarding the number of Bretonophobes during the nineteenth century, studies do indicate that were at least 1 million speakers of Breton at the turn of the century, that is, 70% of the population of Low Brittany[3]. In view of this data, a series of studies carried out by the Rennes section of the INSEE reveals a different and hardly pessimistic evaluation of the practice of Breton[4]. Out of a total of 534.000 people who understand Breton well, 369.000 speak it habitually, but two thirds of these are people aged over sixty: 268.000 claim that Breton is their mother tongue and, in general, live in Low Brittany.

In contrast to those for whom Breton is their mother tongue, 40.000 people have learnt it (schools, night classes, intensive courses): more than half are aged less than thirty and a quarter live in Gallic territory. Among the under sixteens, 11.000 profess to understand and speak breton and 5.000 can read it. The survey conducted by the INSEE in 1994 showed that transmission of the language from one generation to another is weak (3%). Nevertheless, bilingual schools are attracting more and more pupils: in 1996, the total number of pupils enrolled in educational centres such as the pioneer association *Diwan* or even the bilingual classrooms in state and private schools was 3.401, although the annual increase of pupils is around 13%[5]. In the 1995 school year, *Diwan* opened a school in Plésidy (Côtes d'Armor) which today registers 70 pupils. Even while waiting for new premises in Carhaix, the Relecq-Kerhuon school, near Brest, and its annex in Quimper teach almost 300 pupils, which is another significant element that illustrates the vitality of the bilingual education sector. The teacher training college at Saint-Brieuc (IUFM) currently receives 20 would-be teachers destined to teach in bilingual classrooms, that is, 5% of the entire number of candidates at the entrance examination. For its part, *Kelenn*, a centre that trains future *Diwan* teachers opened in Quimper in September 1997 and receives 15 *stagiaires* for intial training and approximately 150 for continuous training.

To resume, the results obtained from the INSEE survey show that all politics regarding the development of bilingualism should take into account this social-cultural duality: on the one side, an ageing population that lives in the rural milieu, for whom Breton is the mother tongue, and on the other, a young population that lives in cities (or even towns where Breton

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2 Source INSEE, 1990 census.

3 Francis Favereau, *Bretagne contemporaine. Langue. Culture. Identité*, Morlaix: Skol Vreizh, 1993, p. 22-28. See also Fanch Broudic, *La pratique du breton de l'Ancien Régime à nos jours*, Rennes: PUF, 1995, as well as the study by Mari C. Jones, *La Langue bretonne aujourd'hui à Plougastel-Daoulas*, Brest: Brud Nevez, 1988.

4 "Propos sur la langue bretonne" in *Les dossiers d'Octant*, revue de l'Insee-Bretagne, n° 23, 1990. "La pratique du breton dans les communes" in *Octant*, revue de l'Insee-Bretagne, n° 48, 1991 and "La connaissance du breton" in Octant, n° 56-57, 1994. In April 1997, a survey conducted for the *Télégramme de Brest* and *France 3 Ouest* by the private school *TMO Ouest*, arrives at similar conclusions.

5 This growth rate is more remarkable than in the rest of the school system where the total number of pupils tends to remain static, and even decrease due to the decline in French natality.

has never been spoken) for whom French is the principle language of reference and whose knowledge of Breton comes solely from schools or night classes. If the Celtic language is to survive, it shall do so by grace of educational policies. In this sense, the media in general and television in particular should play a decisive role as informers and promotors of culture with specific programmes that encourage the younger generations' budding use of the language in day-to-day life[6].

c. The media systems

• Hertzian television

Until 1984, the Bretons, like the rest of the French, had 3 public television channels. The first, created in 1948, reached Brittany later as the broadcasting station in Rennes was not installed until 1959. The second channel was launched in April 1964, with the first colour transmissions appearing in October 1967, and becoming the norm the following year. The third was created in January 1975, whose particularity was that it was a national station with a network of regional channels, where each day regional programmes took over from Paris usually from about 5 pm to 7.55 pm. On a geographic level, France 3 Ouest covered an area broader than the five “historical” *départements*, since the “great west” of regional television also included Mayenne.

Canal Plus, the paying channel, began broadcasting in 1984. Two private channels (La Cinq and Métropole Télévision) began in 1986 and TF1 was privatised in 1987.

While the advantage France 3 enjoyed was clear thanks to an earlier network and season of programmes, it nevertheless faced the task of having to redirect national Hertzian channels to a regional audience. In a kind of double shift motivated by internationalisation, the national news bulletins began to lose audience in favour of France 3: from having 29% of the market in 1990, regional news went on to corner 43.7% in 1996. In view of this tendency towards home-produced information, M6 launched in 1989 local news bulletins in some ten cities, including Nantes and Rennes. TF1 opted to work with the Quimper-based company, Master Infos, producing short programmes on social and cultural events in Brittany. In 1996, almost 510 reports filmed in Brittany were shown in the TF1 news bulletins, thus allowing the commercial channel to offer a wide-range of current affairs, including national and international news as well as covering what was going on in the “province”.

[6] Quoting a US researcher, Mari C. Jones insists in her study on the albeit marginal role of the media, of work and of public authorities that cannot act as a substitute for what the mother tongue does, i.e. transmission parent-child and the deeply-rooted practice in the family and in the community.

In the face of this competition, France 3 retaliated by launching in 1990 local editions. There are currently 19 of these local editions in all of France – 3 in Brittany *(Estuaire* in Nantes in 1990, *Iroise* in Brest in 1992 and *Haute Bretagne* in Rennes in 1994). In general, they come on air at the beginning of the evening, at around 6.55 pm, and last 5 minutes. With its 13 regional boards, 25 regional information offices (BRI) whose function is to produce and broadcast news bulletins and 56 full-time offices with one or two journalists working on a regular basis to provide images via a system of audio-video terminals, the third channel currently occupies the top rank in terms of regional implantation.

With regards the programmes, the pattern they follow is that of a national state channel that broadcasts specific programmes in accordance with its vocation as a decentralised channel[7]. In this sense, if nation-wide programmes are the core of programming, the regional boards show almost 15 hours a week of home productions (reports or thematic magazines). Apart from the regional and local news bulletins (at midday and in the evening), there are programmes specific to the region, for example *An tool Lagad*, a news bulletin presented in Breton, or even *du-Man, du-se*, a 40 minute-long magazine. Other parts of the programming are dedicated to programmes produced in different French regions: *Couleur pays*, a kind of programme-container lasting 4 hours proposes each Saturday afternoon a series of magazines each 26 minutes long, produced by FR3 Lyon *(Évasions)*, FR Dijon *(Les Pieds sur l'herbe)*, FR3 Marseille *(Destination pêche)*, FR3 Lille *(Sur un air d'accordéon)*, FR3 Normandie *(Côté Jardins)*, etc. This programming policy allows for a better evaluation of inter-regional exchanges; it also illustrates a marked Jacobin tradition in regional television.

Regarding the Breton language, some very episodic experiences came about from 1960 onwards. It was not until 1964 that Charlez Ar Gall succeeded in holding down every Friday a minute and a half in Breton. The following chart shows clearly how the so-called regional languages are treated in France 3. The outgoings of the regional channel explain in part the scarce amount of broadcasting in Breton. In comparison to other countries, the chart speaks volumes: nearly 40 hours a week in Welsh for the channel S4C and 20 hours a day in Galician for the Galician autonomous television channel, TVG.

[7] This decentralisation was criticised as for a long time the term only served to mask the increasing control of information in the region by the political power. See on the subject Antoine de Tarlé, "The monopoly that won't divide" in *Television and political life; studies in six European coutries*, published by Anthony Smith, MacMillan Press Ltd, 1979.

FRANCE 3 PROGRAMMES IN REGIONAL LANGUAGES
(number of hours per year) Source: CSA – Conseil national de l'audiovisuel

LANGUUAGES	1990	1991	1992	1993	1994	1995
Breton	70 h	64 h	52 h	102 h	61 h	53 h
Alsacien	87 h 49'	78 h	59 h	136 h 15'	92 h 20'	121 h
Corse	15 h 28'	17 h	" " *	6 h 50'	20 h 28'	40 h
Provençal	23 h	22 h 45'	131 h *	27 h 20'	27 h 20'	22 h
Basque	5 h30'	5 h 15'	28 h	6 h	6 h	25 h
Occitan	34 h	33 h	34 h	34 h	28 h 40'	31 h
TOTAL	**235 h 47'**	**220 h**	**304 h**	**312 h**	**235 h 48'**	**292 h**

In 1992, programmes in Corsican and Provençal are calculated together

• Cable and satellite

Cable television is relatively recent. Over the last ten years, 8 Breton cities have chosen this type of teledistribution (chart 2).

CABLE TELEVISION IN BRITTANY IN 1995

	Created	N° of inhabitants	N° of connections	N° of subscribers	Percentage of implantation
NANTES	1989	247 000	91 740	14 600	16%
RENNES	1987	200 000	97 611	32 212	33%
BREST	1989	160 000	75 000	16 500	22%
LORIENT	1989	60 000	26 500	5 565	21 %
PONTIVY	1990	13 000	5 097	255	5%
VITRÉ	1995	15 000	4 826	241	5%
CESSON-SÉVIGNÉ	1994	13 000	4 666	467	10%
MORLAIX	1995	20 000	8350	585	7%
MOYENNE		728 000	313 790	70 425	22,4%

However, only three of these cities have channels that produce and broadcast short reports on current affairs and local news: Rennes with TV Rennes, Brest with Brestel and Lorient with Canal Local. In fact, urban cable networks serve mainly to substitute the thematic programmes offered to satellite subscribers and in this sense they are geared primarily to a solvent clientele. Even though there is a local channel, the few hours per day of broadcasting, when not taken up by numerous re-transmissions, are generally dedicated to information and become lost in a sea of second-rate series and low-price markets. The reasons account for this disproportion are economic as production costs are high: information, whether local or not, means activating entire crews and procuring technical structures that are too expensive for the community. Cities such as Nantes have thus abandoned the idea of creating a local television station. Also, some network authorities want to give cable television another try by taking a more active role in regional production and opening programming up to people from associations and local cultural life (as is the case of TV Rennes).

These networks must take the credit, then, for favouring a return to multicultural issues and treating and exploiting them better, which they do by contacting associations, and people from the cultural and economic spheres. So despite certain hypotheses bandied about, six new projects for the urban network have been accepted in Quimper, Saint-Brieuc, Hennebont, Larmor, Inzinnzac and Vannes, raising to 14 the number of cities in Brittany with cable television. One of the motives has to do with some town councils' desire to solve the aesthetic problems that the satellite dishes brought to rooftops and balconies. Another is the fact that the solvent clientele attracted to this kind of service lives in town centres, or in the new areas of town taken over by the middle classes.

The introduction of satellite in Brittany has also followed regional gauging strategies where the issue of Breton culture has managed to insert itself in channels that show mainly recycled national and international programmes and stock films. There are currently two promotors of satellite in France: TSP (Television via satellite), which depends on the group Bouygues/TF1 and Canal Satellite Numérique which is linked to Canal Plus. In an climate of extreme competitivity, how does one make the Bretons choose one or the other? TF1 authorities are prepared to concede a two-hour long programme daily to Brittany on one of the channels[8]. In the information sector, LCI, the non-stop current affairs channel that belongs to TF1, is already showing reports filmed in Brittany by three crews from Master Infos.

d. The political and legal context

Until the law passed in July 1982, the French audio-visual system was the monopoly of the State. This situation led to the creation of a codified paying television (Canal Plus) and of two private channels (La Cinq and M6). The case of TF1 was the result of a political decision, very much in line with the neoliberal doctrine in economy of the eighties. Indeed, the first public channel later became commercial, following privatisation. The end of the monopoly of broadcasting would permit operators to enter the network of urban cable transmission: in France today there are almost 300 stations, of which approximately forty are local. Due to the relatively low growth rate of cable (there are a million and a half subscribers), its promotors are awaiting more flexibility in legal handling of publicity.

With regards to France 3 Ouest, its financing comes from the global budget of France 3, the national channel. A series of articles define its vocation as a public service in the region.

[8] See the interview with the chair and managing director of TF1, Patrick la Lay, "It is vital that the film by Marie Hélia and Olivier Bourbeillon *BZH, des Bretons, des Bretagnes* be given prime time screening on TF1". Also, numerous interviews with actors from audiovisuals confirm TF1's interest in disconnecting regionally in TSP.

Chapter II of Appendix 2 listing the objectives and obligations of France 3, could not be more explicit in certain areas: article 16, concerning the “broadcasting in the principal languages of the region” stipulates that “the company contributes to the expression of the principal regional languages spoken in the metropolitan area”. Also, article 24 regarding the “regional programmes” states clearly that “the company encourages regional and local information as well as the development of local broadcasting and shall endeavour to increase aerial connections through its regional boards and to include more regional programmes in national programming”. In this context, no fee has been fixed and the language issue is considered as one of the obligations of the public service. As a result, the figures illustrate the limits of promotion of minority cultures inside a national television system.

One regulatory body, the Audio-visual Superior Council (CSA), supervises standards and legislation, renews broadcasting authorisations and decides upon new concessions.

THE AUDIO-VISUAL SECTOR IN BRITTANY
Production in 1994/1995/1996

47 questionnaires were circulated around Brittany, using a list of addresses obtained from the APAB (Association des producteurs audiovisuels bretons), from the Minitel as well as from old audio-visual guides. Out of this total, six companies have disappeared (Steamer Production, Joël Tasset Production, Les films Émeraude, INPAR communication, Image et son et Vidéo 44) and four in the end were not included in the study as it was considered they worked outside the field of audio-visual production (Atlantic Télévision, Mégaliths, Boutique Multimédia and Socitété Vidéo Production). Out of the remaining 35 companies, 26 filled out the questionaire, indicating a relatively high response: 70.2%. A more detailed analysis reveals that 84.6% of the companies belonging to APAB answered. The fact that we disposed of almost complete data on these companies – which work either wholly or in part for television – allowed us to draw up a chart that faithfully reflected production in the region.

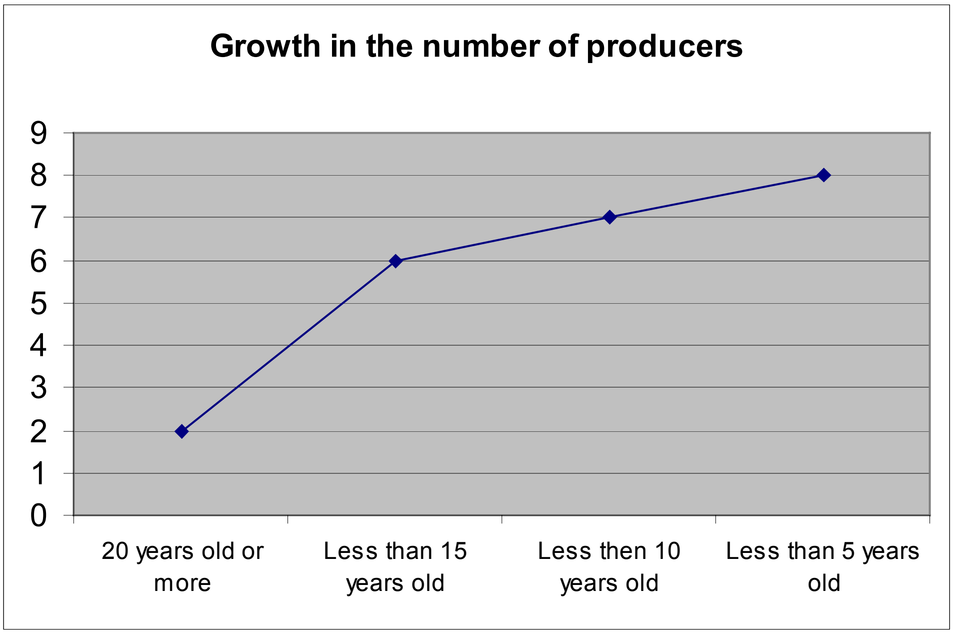
We could establish four categories of companies. The first is made up of broadcasting companies that have a status of regional producers. France Ouest 3, M6 and cable televisions such as TV Rennes belong to this category. The second comprises the thirteen independent companies that belong to APAB. The third category includes independent companies that generally work with institutions. Eight organisations belonging to the associative sector or to public institutions make up the fourth category. The following analysis is essentially the result of the data obtained from the independent companies (11 in the second category, and 6 in the third) and from 6 from the fourth category who work as producers; in total, 23 companies. It was not considered pertinent to include the broadcasting stations-producers for two reasons: firstly, because they usually co-produce with the independent companies already analysed and this would lead us, on occasions, to count the same company twice; and secondly, whether in budgetary terms of in terms of programming – especially with flux programmes – to include figures from these companies would have distorted considerably the global results.

It is pertinent to offer information about certain broadcasting stations. France 3 Ouest, with a budget of approximately 135 million Francs and a staff of 250 people, produced 450 hours of information and 250 hours of programmes in 1997. Producing one hour of information costs around 200.000 Francs, one hour of broadcasting time between 100.000 and 150.000 Francs and one hour of broadcasting in Breton, 300.000 Francs. 70% of the budget goes on salaries and cachets; the information part absorbs 60% of the budget. Of the 206 minutes of the magazine *Couleurs Pays* broadcast every Saturday afternoon, France 3 Ouest produces 140. In the case of TV Rennes, its budget is 7 million Francs. With 17 members of staff, it broadcasts via cable 176 hours of “aerial production” to 15.000 subscribers. The greater part of production is dedicated to home-produced information. The local stations of

M6 (in Rennes and Nantes) produce, respectively, with staffs of 9 people each 7 minutes of news 5 days a week, which breaks down as 5 minutes of information, 1 and a half minutes of “agenda” (local events) and 30 seconds for the weather.

In the end, as a result of the contents of the questionnaire and the semi-conducted interviews held, it was decided that 23 producers would analysed further.

1. GENERAL INFORMATION



In general, audio-visual production companies in Brittany are young, as more than a third have been created in the last five years.

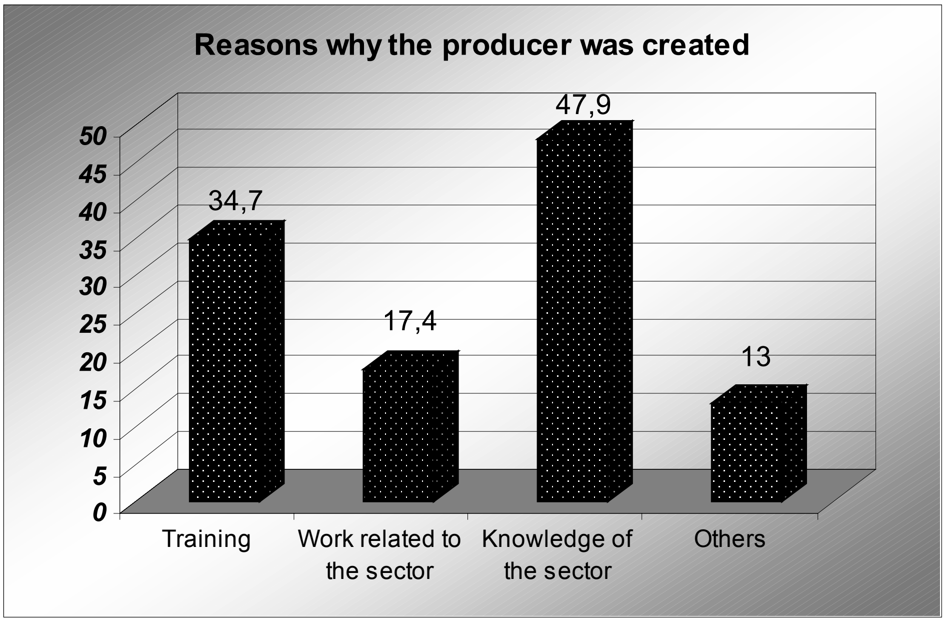
They are also small companies: all have a staff of less than fifteen. 13 of them are grouped at the core of producers' associations (the APAB – see annexed list). These are the ones that were created most recently, and that work mainly for cinema or television.

Legal status of the producers

PLC	*Private company*	*E.U.R.L.*	*1901 Assoc. law*	**Others**	**No answer**
13%	**61%**	**0**	**13%**	**13%**	**0%**

It is worth mentioning that more than three quarters of privaye companies have a capital of 50.000 Francs.

2. INFORMATION ON HOW THE PRODUCERS WERE CREATED

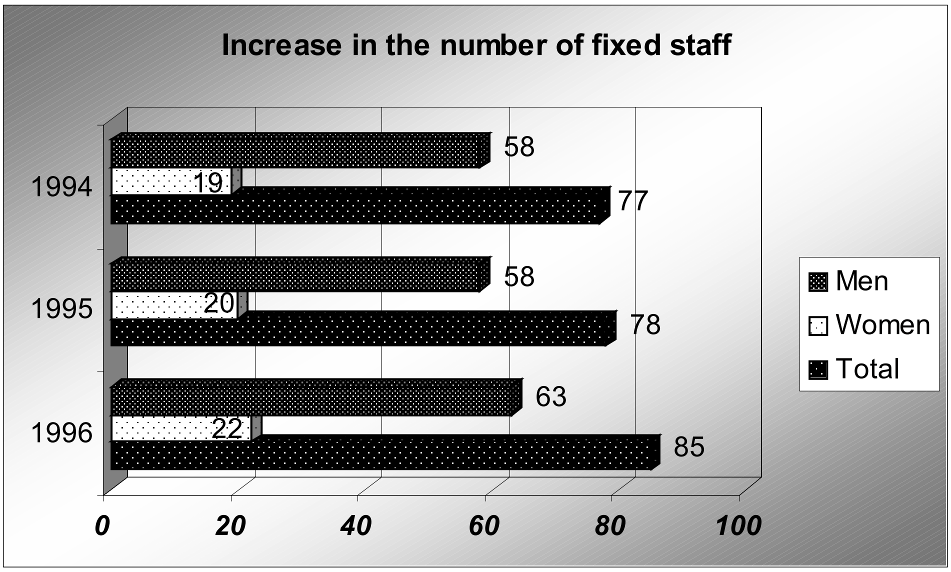


Clearly, knowledge about the sector is the main factor that motivates people to set up a producer. Logically, training is also a determining element. However, initial training is seldom related directly to the world of producing. In fact, many producers come to it from audio-visual direction.

Among the 13% that mentioned other reasons for setting up a producer, we found directors who became producers for want of finding a producer who would carry out their project, or two people motivated by the sole idea of setting up a company. The latter is worth special attention as in the audio-visual sector they are marginal: the passion for the cinema or television, or “a dream nurtured since childhood” as some confessed to us during the interviews, constitute the principal motivation.

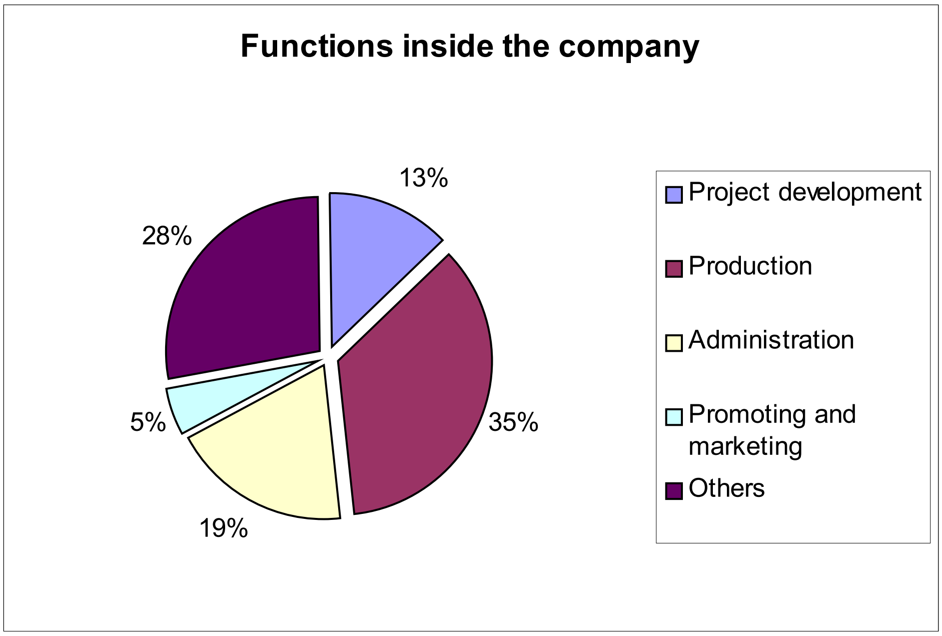
Associations aside, the companies did not receive backing at the moment of their creation. The reason generally given is that audio-visual production is a high-risk sector and not especially regarded, not only by regional but by national economic authorities.

3. EMPLOYMENT



Including the total number of broadcasting stations/producers (250 for FR3, 17 for TV Rennes and 19 for M6 Nantes and Rennes), there were 371 people working directly in the audio-visual sector in 1996.

Jobs lay mainly (nearly 80%) with producers who work for institutions. 7 of the producers that belong to APAB have no paid staff; they are run by people who are in other professions. It is also worth noting that since 1995 the number of women has gone up slightly; a tendency which is confirmed by the data we have for 1997, that show that women represent a third of the total number of people in this field (30 women for 61 men).



In general, the distribution of activities shows that production itself occupies 35.4% of the posts, administration 18.7%, project development 12.5%, and promotion and marketing 5.2%. The remaining 28.2% is covered mainly by technicians and press coverage.

The practice of training periods *(stages)* is commonplace, even keeping within relatively modest boundaries. In 1996, 33 people spent an average of 1 month in other production companies.

Regarding the number of contracts signed between the companies and their temporary staff, the information we were given is not very useful, for three reasons: firstly, 10 companies did not facilitate any figures (4 because they employ temporary staff, 5 because they did not fill out the questionnaire and 1 refused to do so); secondly, no distinction was made between men and women; thirdly, while some companies keep data on the number of contracts, others make a more detailed analysis of the day's work. With this in mind, the partial figures we have permit us to assess, albeit imperfectly, the situation. Thus in 1996, 1274 days were paid to technical staff and 209 days to artistic staff. Yet one company, Ouest Audiovisuel, claimed to have drawn up 250 contracts with temporary workers, thus throwing into confusion all the categories.

The criteria for selecting staff, whether production staff, technicians or artists, value above all experience and the reasons for wishing to work in this sector – the *savoir-faire*, or a certain talent or even dynamism. A diploma counts only occasionally, this being the case for administrative personnel or salesmen (8.5%, according to the survey).

Policies regarding training affect 56.6% of the companies and embrace mainly audio-visual production. In general, they are linked to European training programmes: “Produire en région”, and “Entrepreneurs de l'audiovisuel européen” (EAVE in the Media scheme).

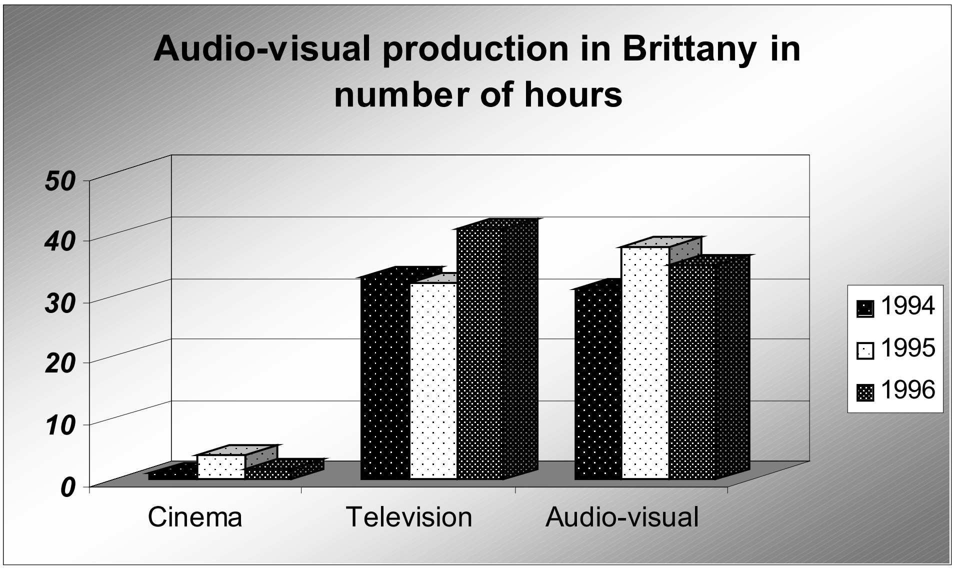
Journalists, directors and technicians also follow courses in specialised organisms: Association for the training of audio-visual and spectacle artists (AFDAS), Centre for the Training and Perfectioning of Journalists (CFPJ), the Chamber of Commerce and Industry in Paris (Gobelins) and the Institut National de l'Audiovisuel (INA).

4. AUDIO-VISUAL PRODUCTION

Over the three years that lasted the study, producer companies in Brittany produced 6 films (2 animated films and 1 documentary in 1994, 2 short films in 1995, 1 long film in 1996), as well as 1800 productions for television. In fact, the elevated number of productions for television is due to the variety of formats, which go from 1 and a half minutes to 53 minutes. The company Master Production made 1500 pieces of news for TF1 and LCI. With regards to institutional production (which consists of assignments for films or educational audio-visual projects), there were 688.

Detailed description of the productions

The following data are not part of the flux programmes and the programmes produced by broadcasting stations. In 1994 there were 16 producers, of which 6 belonged to APAB. The category of "film" includes long and short films filmed in 35 mm or in 16 mm and projected in auditoriums. The category "television" includes news, reports, documentaries, fiction, cartoons and short spots (clips) broadcast by Hertzian companies via cable or satellite. The category "audio-visual" includes institutional production (scientific or educational videos), audio-visual documents assigned by private or public companies, advertisements and multimedia.



With regards to cinema, 3 films were produced in 1994: two were animated films lasting two minutes. One was filmed in 35 mm (*Ovo*, by Pierre Bouchon and José Miguel Ribeiro), and the other in 16 mm by Luc de Banville and Felipe Moreira da Silva *(Professeur Nylo):* and the third was a documentary by Thierry Compain entitled *Village au cimetière*; two shorts of fiction were produced in 1995: *Le son des choses* (13') filmed in 35 mm by Patrick le Goff and *L'enclume et la sardine* (22') in 16 mm by Jean-Christophe Giovannelli. In 1996, *La femme défendue*, a long fiction film lasting 1 hour and forty minutes was presented at the official selection at Cannes.

With regards to television, two companies control the market, producing 70% of the total amount of productions made in 1996. Master Production specialises in information and produces 14 hours of news, which represents 29% of all productions. Lazennec produced 39.5%, comprising scientific magazines of an educational nature (36 26 minute episodes, i.e. almost 15 and a half hours of programmes for *C'est pas sorcier*, broadcast by France 3) and documentaries (3 and a half hours).

In the category “audio-visual”, the ratio of films made for assignments (or company films) and films made in association is 60/40. In the first group, two producers (Her-Bak and Ouest Audiovisuel) corner an important part of the market. In the second, associations and services integrated into public institutions make primarily scientific and educational programmes. Nevertheless, they also occasionally take on assignments, particularly for their financial backers. This situation provokes certain reservations on the part of independent companies who perceive this kind of extra activity as unloyal competition.

Volume of production

A total of 41 hours of stock programmes were produced in 1996, i.e. 28% more than the previous year. This figure is equivalent to one week of programming on a television channel. Breton producers depend largely on France 3 (national and regional), on TF1 (for news) and, to a lesser extent, on the Franco-German channel Arte. France 3 Ouest produces annually 700 hours of flux programmes_and stock programmes, which corresponds to 450 hours of information and 250 hours of programmes.

Financial support

The greater part of television productions receive backing from COSIP (Support Action for the Programmes Industry), which depends directly on the Centre National de la Cinématographie (CNC): automatic support, financial advances and selective contributions. Cable network, which the CNC consider as broadcasters in the full right, opens COSIP up to any producer that co-produces with a network or obtains an engagement of purchase. Producers also co-produce with channels. They can obtain rights for pre-acquisition and technical support. On a regional level, the Cultural Institute of Brittany or sometimes councils back certain productions and the regional cinematographic workshop in Quimper (ARQ) provides consulting, technical support and material. In 1996, the ARQ participated in the production of 7 short films, 2 animated films and 5 documentaries, and supported the script of a long film *(Les tueurs de la lune de miel)*. There are also requests for support from Europe, mainly from the club of media investments for animated cinema (the Media of the European Union programme).

Linguistic aspects

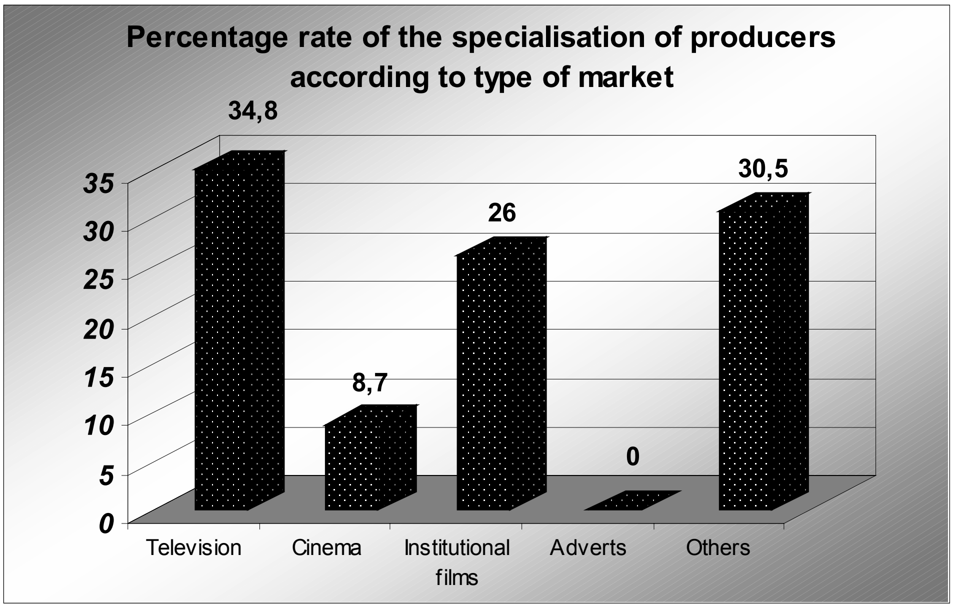
A detailed analysis of productions shows that there are few films or videos filmed exclusively in Breton. Olivier Bourbeillon and Marie Hélia's film *BZH, des Breton, des Bretagnes*, co-produced by Lazennec, includes some interviews held in Breton (subtitled in French). The pilot *Roger the Rooster*, an animated film produced by Africa (CREA-University of Rennes 2) was made in Breton with versions in French and English. Some of the magazines broadcast on tape by Tregor Vidéo occasionally include sequences in Breton: the shorts *Berr ha Berr*, documentaries such as *Boulou pok* and *E Bro an aerouant ruz*.

On the whole, filming in Breton is so marginal that even one producer (Kalanna), created in 1997, was based on a two-fold premise: firstly, independent companies are barely concerned about the linguistic issue, and secondly, France 3 Ouest leaves little room for documentaries in Breton. With approximately fifty hours a year, France 3 Ouest offers since the end of 1996 the greater part of the programmes in Breton, with subtitles in French.

With regards to other languages, there are few productions made in a language other than French or with subtitles. In Lazennec, the documentary *Chasing Marc Behm* was filmed in

English and subtitled in French. CREA, an audio-visual centre that depends on the University of Rennes 2, produced titles in Spanish, Italian and English. This interest is due in part to the educational and investigational vocation of the University.

Specialisation of production according to the type of market



Thoses who work for television generally specialise in documentaries, educational scientific magazines or news. The few producers who work for cinema do so in the field of fiction and animation. 30.5% of producers specialised in other markets in fact work for the educational sector or for cable network.

Production rights

The question of production rights was hard to assess, due largely to the complexity of the rights system in France. Also, the producers who took part in the study found it hard to define partial estimates even though most claimed to possess the majority of rights for screening both publicly and on television. The situation is the same in the case of videos. This absence of data surely constitutes a grey area in this study.

Foreign sales

56.5% of companies have not sold abroad in recent years. The rest sold 14 productions totalling 8 hours and 20 minutes. Their principal destination is Europe and are broadcast via branches of Canal Plus. Sales follow the pattern, by genres:

Cinema: 1 long film

Television: 7 documentaries, 1 animated and 1 televised spectacle

Audio-visual: 2 institutional productions and 2 videos produced by artists

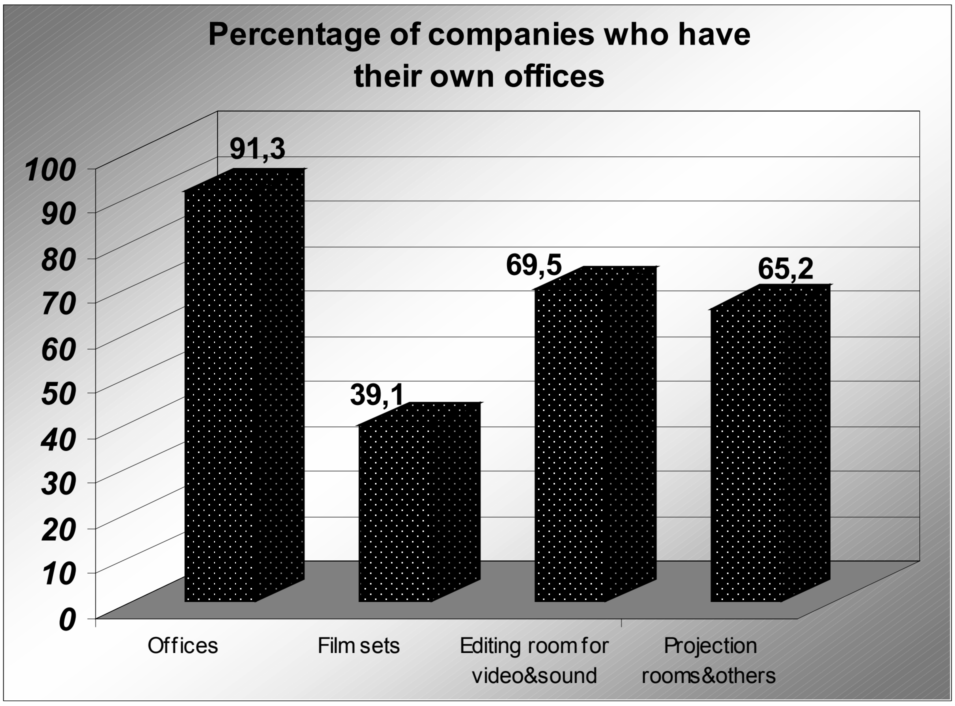
It is important to point out the existence of a company specialised in the distribution of Breton audio-visual products: Steredenn, created in November 1996 by Jacqueline Irlande, disposes of a catalogue of 21 titles (documentaries and animated films) totalling approximately 20 hours. Irlande has worked since 1995 in the commercialisation of audio-visual products; in fact, until the creation of Steredenn, she ran distribution at ARC. Sales abroad have been possible largely thanks to this organism, as producers do not have the time nor the staff to distribute their products.

Awards

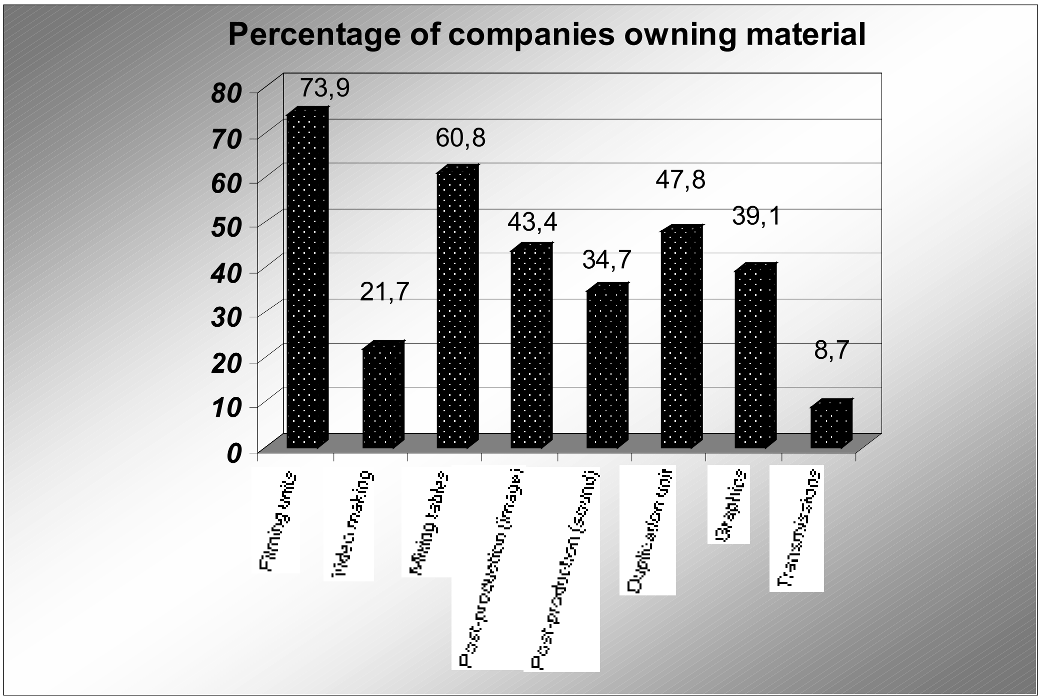
A total of 21 productions have received prizes: 5 animated films, 12 documentaries, 2 fiction films and 2 institutional films. Prizes are usually awarded on a national level and the Douarnenez Film Festival is particularly important.

5. OFFICES AND EQUIPMENT

The majority of producers either own their own offices (52%) or rent (39%). They have a minimum of one office which is generally the address of the company too. If they dispose of other offices, these are usually projection rooms which also serve as storeplaces for documents and even technical material. Film sets are rarer, as they require a more complete set of equipment, thus raising the costs. Normally, producers who have a film set work for institutions.



Of the 23 companies, 17 had basic audio-visual equipment and one or more film units. The most common camaras were Betacam Sp (13 producers), followed by digital camaras (7 producers) and Hi8. Having a film unit allows greater autonomy. This accounts for why 14 companies had mixing tables. There were two companies, however, whose situations were hard to assess: one was the CREA, that used an interactive broadcasting network, *visicable*, and the other, TDF, used electron beams hired from Master Production which, in turn, hired two mobile units equipped with Betacam Sp for filming or re-transmitting televised and musical events.



On the whole, producers do not come up against great shortages when looking for technical material in the region. Brittany is relatively well equipped and disposes of qualified technicians.

6. ORGANISATIONAL STRUCTURES

The thirteen independent producers at APAB who work fundamentally for television became partners. The aim of this association was to defend the interests of audio-visual producers of the region. It was conceived to act above all as a kind of economic and political lobby.

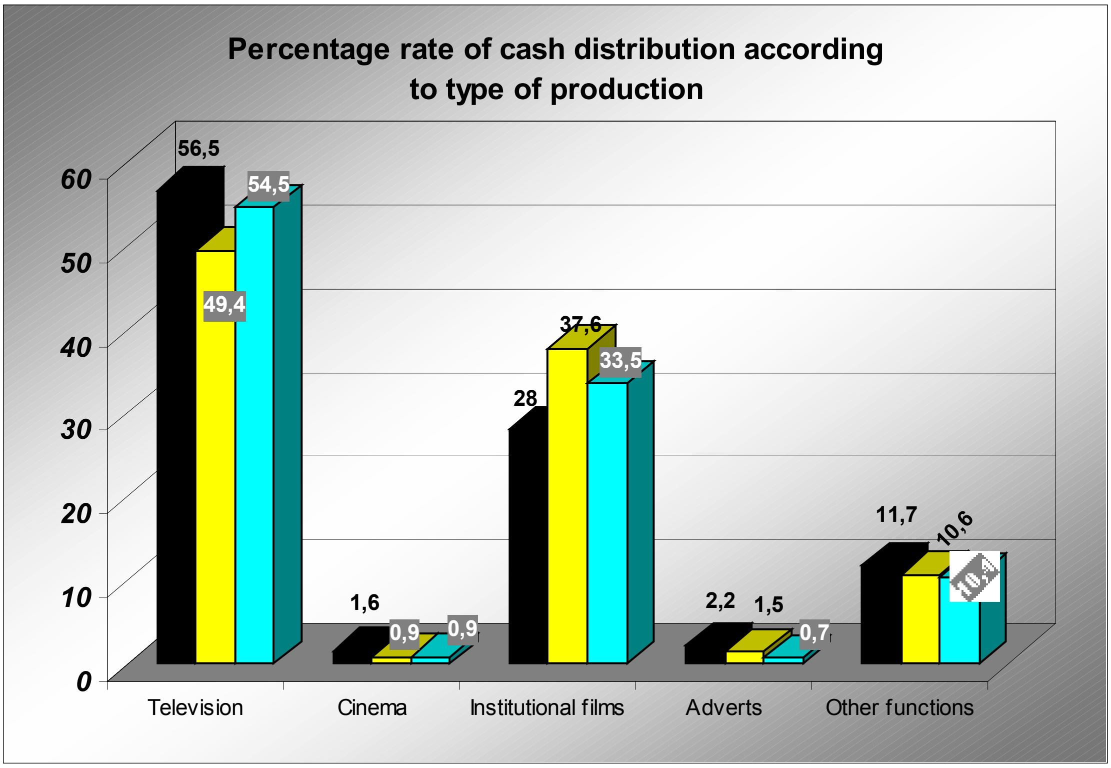
Moreover, the producers are affiliated to two national trade unions: the SPI (Syndicat de producteurs indépendents) and the SYNPA.

7. FINANCIAL ASPECTS

In the last three years, the producers' volume of business has risen steadily, which is a good sign, although the situation varies greatly from one producer to another. Companies that work with institutions are successful, their capital is high and make a profit. For others, associated with the APAB, the situation is considerably more precarious; leaving aside Master

Production and Lazennec (whose volume of production assures them a healthy cash flow), subcapitalisation and the scarcity of financial backing as well as the aleatory nature of production render relationships with the bank all the more delicate, even awkward. By contrast, the associative field is rather more protected; if self-financing is a norm which can reach 70%, it is not less true that the majority of associations function with a hardly paltry backing and that salaries are often paid by the organism that funds the project.

Year	**1994**	**1995**	**1996**
Amount of cash in Francs	22.784.972 Fr	39.944.359 Fr	44.965.443 Fr
Amount of cash in Euros	3.801930,91	6.665.169,19	7.502993,99



The figures referring to profit should be analysed closely for two reasons. Firstly: over the last three years, 9 companies did not make any profit (of which 7 belonged to the APAB), 14 if we count the public audio-visual associations and services which tend to balance out their budget. Secondly: among the 9 that made a profit, 3 did not reveal figures; these being the three strongest companies in terms of business (Master Production, Her-Bak and Ouest Audiovisuel). It is therefore deducible that they made a profit because 6 more modest companies did so. For this reason, the following table should be read really as a guide only, as it deals with the results of only 1 producer in 1994, 4 in 1995 and 6 in 1996 (out of a total of 16).

Year	1994	1995	1996
Profit in Francs	16000 Fr	368 000 Fr	868 000 Fr
Profit in Euros	2.669,78	61.404,97	144,835,64

Note: The exchange rate between Pesetas and Euros is that of 28 April 1998.

REMARKS

Given that the companies analysed were created only recently, Breton audio-visual producers are still very fragile. Certainly, their volume of business has enjoyed over three years an annual increase of 5%, and even though this increase benefits in principle the production of institutional films and services (especially the multi-media), it was evident from the interviews that this “institutional” activity favours more or less directly television production. Therefore, producers specialised in television try to enter, whenever they can, the high-level institutional sector (animated or promotional films); the profits or simply the money available in these more “regular” productions allow producers to finance more high-risk projects for television.

Nevertheless, most of the private companies are subcapitalised, which debilitates to the point that they do not dispose of any surplus. The interviews revealed that many thought that a small audio-visual company cannot really function without a minimun capital of 100.000 Francs. This is particularly true for producers of animated films, where approximately 80% of the budget goes on salaries. An increase in capital or access to credits are not easy in a sector which few in the economic and social spheres take seriously.

The 41 hours of programmes produced in 1996 are equivalent to one week of programming. The global volume of business of Breton companies represents approximately 45 million Francs, i.e. that of a small or medium-sized company. With this in view, the creation of a new channel in Brittany naturally interests producers. However, if the latter are aware of the oxygen balloon this can mean in terms of production of programmes, they also realise that at the moment it would be hard to satisfy the demand.

THE CONTEXT OF GALICIA

a. Introduction

Galicia, with a population of 2.8 million, 7% of Spain's total, and an area of 29,575 square kilometres, is one of the so-called historical national communities of Spain, together with the Basque country and Catalonia. Such a status was achieved after democracy was restored, when devolution was procured as had been ratified through referendum back in the days before the Spanish Civil war, through the Statute of Autonomy drawn by the Parliament of the Spanish Republic in its session held in 1937 in Montserrat, Catalonia. The case for Galicia was defended by one of our most notable politicians in those days, Alfonso Daniel Castelao, who continued to work for national and social rights from his exile in Argentina.

The new Statute of Autonomy, adopted in 1981, acknowledges Galicia its status of national historical community and grants a series of legislative and executive competences transferred from the central State. This process of devolution becomes manifest both at the levels of social mobilisation and in the results after elections.

The Parliament of Galicia, seating 75 Members elected directly every four years, is the legislative body, and the Xunta de Galicia is the executive body. The president of the Xunta is elected by the Parliament. At the last election, held in October 1997 and where there was the highest attendance ever since the reinstatement of Democracy, the conservative PP (People's Party) obtained 52 % votes. For the first time the nationalist left-wing BNG (Bloque Nacional Galego) became, at 25% votes, the leader of opposition. The coalition made up of the Socialist, Communist and Green parties achieved only 19%.

The nationalist movement in Galicia started in the 19th century, when some enlightened sectors of society started to associate the idea of Modernism to that of political freedom. 1916 saw the first national organisation “as Irmandades da fala” (Brotherhood of language), later to become the Galician Party that was very active during the 2nd Spanish Republic. In the 1960's several groups were formed, having diverse ideologies, including some Marxist groups, and during the 1980's many of them assembled into the BNG. Nationalist trade unionism is to be identified with the CIG, (Galician Confederation of Trade Unions), holding majority -over 26%- of representatives at works councils. Another relevant organisation, especially given the ongoing problems of European Agriculture, is the SLG (Farmers' Union of Galicia).

The population density is 94.4 inhabitants per square kilometre, concentrating especially along the corridor between the cities of Vigo and Corunna, with a population around 300,000 inhabitants each. Together with the capital, Santiago de Compostela, they are the major urban centres. From 1986 to 1993, the GDP of Galicia grew by 3.8%. The breakdown of active population by sectors is 61% for services, 30 % in industry and 8.5% in agriculture and fishing, all of which employ a large percentage of female population.

b- The linguistic situation

Galician is the official language, together with Castilian Spanish. Citizens' rights to use the language are governed by the Law for Linguistic Normalisation of 1983, as well as by further by-laws and regulations pursuing to restore its use at instances such as Administration, Justice, Teaching and the Media.

After a period of splendour that reached the mid-13th century with the peak of medieval Galician literature, the language underwent systematic abandonment. It started with the Catholic Royals, Isabella and Ferdinand, whom in the 15th century enacted the “Taming and castration of the kingdom of Galicia”, to enter into a situation of linguistic diglossia until in the 19th century the language became part of a new awareness of otherness. During Franco's dictatorship, the language was overtly repressed, and its public use was persecuted except when used in folkloric or archaeological spaces. This official policy towards the language was reflected in the media, as it found no space in general information, being limited to the odd individual contribution.

In the final days of Franco's regime, together with other changes, social pressure brings Galician language back to the printed press, as well as to radio and television. This, however, came in a residual manner, never amounting to more than 5% of the content volume in daily press. In 1977 the first weekly periodical was published entirely in Galician language: A Nosa Terra. After this headstart, the language acquired greater presence in other written media, mostly in journals specialising in culture and thought, and also in some professional, academic or local periodicals.

In 1974 the regional centre for TVE in Galicia started broadcasting the first daily newscast in Galician, half an hour long. In the 1980's the Radio and Television of Galicia was founded, and Galician language ceased to be minority in the mass media. The workers in the sector themselves demanded, in 1989, that a commission be established to look after the proper training of professionals in the public information sector, especially directed to improving the oral and written standards of the language. That same year a group of linguists published a text to denounce the Galician spoken on Television, that they accused of being constructed literally out of Castilian Spanish. This was due to the fact that few professionals were fluent in Galician, but also to the policies implemented that were copied from those of the Castilian language based TVE standards. Recent surveys show that 41.3 % of Galician-speakers feel that what they listen to on radio and television is “quite different” from the language they speak and hear every day in the streets.

According to data from the RAG (Royal Academy for Galician Language), practically all Galicians understand the language, 86.4% speak it regularly, 45.8 % read it and a mere 27.1 % say that they may actually write it.

In the field of Education is where language rights have most conflictive developments. Organisation here took an independent form, with the “Board for linguistic normalisation”, that became the driving force in its dissemination, proposing specific measures in order that the relevant legislation be properly implemented (such as Decree 247/1995, that governs the use of the language in Education, both for administration and actual tuition). Trade Unions together with other pedagogical associations and the Board established the “Platform for Teaching in Galician” that for the current academic year 1997/1998 has submitted a series of proposals before the teacher and student bodies, parents' associations and non-teaching staff. These proposals start at kindergarten levels and go across secondary education as well as vocational training. The underlying philosophy is expressed in a statement in the law that is to be included in each centre's Educational Project. We quote this statement to show how much more action is still needed in this field. The title is “Language of learning and linguistic normalisation”, and it reads:

“In order to achieve the normalisation of Galician, the language proper to Galicia, it shall be endeavoured that it become the language of habitual use for relations inside academic centres, as well as to develop all subject matters under the curriculum, excepting Castilian Language and Literature, in accordance with the Law. In order to do so, specific annual plans are to be drafted that take into consideration the specific linguistic situation at each centre in order to guarantee progressive implementation of this objective”

c- The media systems

- **Hertzian Television**

Until the year 1971, only the general programming broadcast from TVE1 and TVE2, the Spanish public channels, reached Galicia. That year, a regional centre opened in Santiago de Compostela, TVE-Galicia. It started by offering disconnected* programming through TVE2. It was necessary to wait until 1974 in order to see newscasts broadcast for the first time in Galician language. TVE-Galicia currently broadcasts seven hours of programming weekly: two newscasts daily Monday through Friday lasting thirty minutes each, and two weekend programmes, Panorama de Galicia- a half hour newscast- and a ninety minutes programme in Castilian Spanish: Desde Galicia para el Mundo.

On July 25th, 1985, in pursuance of a mandate by the Galician Parliament, TVG was inaugurated and started broadcasting from its centre at Bande, in Santiago de Compostela. Several months prior to that, the Board of Administration of the CRTVG (Company of Radio and Television Galicia) adopted a document whereby the following Basic principles of programming were laid down:

A.- To defend and disseminate values representative of human persons and to establish the necessary environment for their practical implementation. This is the duty of every citizen, in accordance with the Constitution, and so of public bodies too.

B.-To exclude from broadcasting anything that may contribute towards discrimination, hatred, denial of the right to inform or be informed, misrepresentation of or lack of respect towards human persons and their right to honour and presumed innocence.

C.- To defend and disseminate the democratic values that govern the Spanish State of the Autonomies and the autonomy of Galicia, supporting any actions that may improve the life standards of the people and their culture.

D.- To pursue dialogue in the style, content and manner in which to behave before a camera or microphone, avoiding violent confrontations, even dialectical, and to promote civilian spirit.

E.- To aspire to reflect reality as it is, without any political doctrine underlying the defence of the basic principles of human development and achievement of social progress. TVG and RTG are obliged to pursue a line of objectiveness, pluralism and service to the people of Galicia, and this is incompatible to any partyism.

F.- To foster participation of the citizens of Galicia in communication processes, providing real opportunities for co-operation in the common task of building and improving modern society in every aspect, even the seemingly simpler ones as may be leisure and entertainment.

G.- In summary, it is the duty of the professionals to strive to raise levels of information, participation and technological progress at TVG and RTG. They are the agents in the direct task of truly serving society of which they also make a part of, the society of citizens who are the recipients of the outcome of the efforts of the people at both media institutions. In this sense, the Board of Administration trusts that the principles that inspire their work may be an incentive to reach the goals proposed.

Programming Objectives at RTG and TVG

1º.- To promote and defend pluralism in society as an expression of freedom and democracy.

2º.- To promote and defend values of dialogue, respect and peace.

3º.- To defend the rules and principles that spring from said values, as well as to show respect to all creeds and moral principles that may be professed by the public.

4º.- To sustain good practice and ethics across the programming.

5º.- The specific objectives as laid out by the Board of Administration of the CRTVG for its communication means are as follows:

a.- To present the world of culture, especially of Galicia, as well as universal culture. A feature of any radio or television is the presence of specific cultural programming.

b.- Socio-economic reality shall also be present in the programming. The autonomy that professionals are entitled to shall be used to disseminate information to contribute to improving the reality of Galicia.

c.- The entertainment that audiences rightfully seek in this type of media must also be present at TVG and RTG. Proper relevant programming should be there without vulgarisms.

d.- Musical expression must also be present at TVG and RTG: the music proper to Galician traditional culture, as well as its modern manifestations, together with music of the World, including classical music.

e.- RTG and TVG shall seek to increase their levels of own production of programmes. In doing so they must endeavour to base content on Galician themes and authors that hold universal value, so this production may reach international markets, thus furthering actions to promote Galicia's image abroad.

f.-Both RTG and TVG shall include specific programming directed to children and youth, for the beneficial development of their personality as citizens committed to the reality of Galicia, of Spain and of Europe.

g.- Another objective of RTG and TVG as media at the service of Galician audiences is the broadcasting of events of general interest, both sports and other, inside or outside of Galicia, that may be of interest to Galicians.

h.- The programming shall also promote knowledge and practice of sports, not only by giving coverage to single events, as a means of contributing towards improving the life standards of Galician people.

i.- The programming of RTG and TVG shall include specific treatment of religious themes or close personal relations, always showing respect to the rights of individuals as to their private life, and shall promote the public projection of people that may be relevant in their work towards improving Galicia in the diverse fields of everyday life: professional activities, economy, science, sports, etc.

The progress and presence of TVG became consolidated in the last few years. The following tables show the numbers of hours of broadcasting, as well as programming and audiences.

Total number of hours of broadcasting and own production.

Broadcast hours per year - TVG	**1992***	**1997***	**Hours of own production (%)**	**1992***	**1997***
	5.829	6.611		31,94	69,63

1992. Comunicacion Social 1993/1994 Tendencias
1997. Data supplied by TVG

1996/97 season

AUDIENCE	Share	Rating	Thousands
TV1	26,7	3,7	96
A3	23,6	3,3	85
T5	20,6	2,8	74
TVG	**18,3**	**2,5**	**66**
La 2	8,3	1,2	30
Canal +	1,9	0,3	7

Prepared by GECA with data by SOFRES A.M.

Right from the beginning, programming at TVG was based mainly on newscasts, flow programming -mostly own production- and fiction (external production). As it evolved, the new trends in programming brought sports, children's programmes and the ultimate challenge, own production of fiction programmes. TVG currently broadcasts around 20 hours daily. The 1996/97 season marked the consolidation of regionalist programming. The musical show Luar has the largest audience, a 36.1% share. The sitcom “Pratos Combinados”, of own production, is once again number two. Two more programmes in the top five are new releases: A Repanocha (19.3%), combining home videos and hidden camera gags, and Con Perdon (20.1%), a talk show also with home videos and interviews. Newscasts improve their rating, TX 1 had a 27.2% share. The most watched programmes in 1996/97 were football match broadcasts.

TVG is one of the seven television stations (six regional stations and RTV Murcia) that joined into a federation in 1989, FORTA, when the commercial television broadcasters were about to start broadcasting. The federation was conceived as a body to pursue fruitful co-operation between the regional stations, both in terms of improving negotiation capacity when buying rights for sports or cultural events, films, series, etc., as well as of organising exchanges of newscasts, co-producing entertainment, documentaries and other programmes.

Since 1989 three commercial, state-wide channels operate: Canal + (encrypted, pay channel), Tele 5 and Antena 3. The latter was the only one two institute a plan for de-centralisation: in October 1994 it opened its regional centre in Santiago and started disconnected* broadcasting. It currently broadcasts seven daily advertising disconnections, with commercials in both Spanish and Galician languages, as well as a thirty-minute weekly programme on Saturdays, Galicia a Fondo, in Spanish.

- **Cable and Satellite**

Cable

The cable networks currently operating are of small operators (Galivision in the Morrazo area, Pro Ges Cable SL that runs the local cable television at Carballi¤o, and Mecatel in Melide). The major project in Galicia is called Grupo Gallego de Cable, incorporated in 1994. Its philosophy is to cluster a group of companies located or with interests in Galicia. The current associates are Grupo Voz, Fenosa, Banco Pastor and the Savings Banks, and it intends to bring cable to the major cities of Galicia: Vigo, Santiago and Coru¤a. Other cable television projects are Faro TV of the Grupo Faro in Vigo (Grupo Moll), and also the Correo Galego TV project, of the Grupo Correo.

Satellite

Under its regional disconnected programming, TVE-Galicia broadcasts the programme Desde Galicia para el Mundo, on the international TVE channel, in Spanish. On the 31st December 1996, TVG started to broadcast via Galeusca, a satellite channel founded jointly with ETB (Basque TV) and TV3 (Catalonia TV). TVG gave up this project to start broadcasting in 1997 on an international satellite channel, Galicia TV, with 100% own production. It reaches all of Spain and Europe, but greatest attention is focused on the American continent, that it reaches through the Panamsat Satellite (there are estimates of about two million Galician emigrants living in the Americas). Galicia TV broadcasts around the clock, the programmes are the same as those of TVG daily except for external productions that are substituted by re-runs or original programmes, mostly in Galician language (excepting some subtitled original versions and a weekly piece in Spanish, made in Buenos Aires.

On September 15th 1997 TVG started to broadcast through the Via Digital platform, where it holds a 2% stake. The programming is basically that of Galicia TV (external production may not be broadcast here, the same as for Galicia TV, due to transmission rights).

- **Local Television**

In the last few years we have experienced a boom of local televisions on the Galician audio-visual scene. The first local television was started in 1984, TV Naron e Terra de Trasancos, that suffered many legal restrictions and transmitted intermittently until the days when licences became granted. Today there are over twenty stations.

The initiative behind these televisions is mostly private, and advertising provides most of the funding. Where there is public initiative, it lies at municipal instances.

LOCAL TELEVISIONS	FUNDING	NATURE OF BROADCAST
A CORUÑA		
RTCompostela	Private	Hertzian
Canal 60	Private	Hertzian
Canal 29 de Ferrol	Private/Municipal	Hertzian
RTV de Melide	Private	Cable
RTV das Pontes	Municipal	Hertzian
TV de Cerceda	Municipal	Hertzian
RTV de Boqueixón	Municipal	Hertzian
LUGO		
RTV de Quiroga	Municipal	Hertzian
TV de Lugo	Private	Hertzian
Lugovisión	Private	Hertzian
RTV de Monforte	Private	Hertzian
RTV Terra de Lemos	Private	Hertzian
OURENSE		
Cablevisión O Carballiño	Private	Cable
TV de Bemposta	Private	Hertzian
PONTEVEDRA		
RTV Tui	Municipal	Hertzian
RTV de Ponteareas	Municipal	Hertzian
RTV de Val Miñor	Municipal	Hertzian
Canal 50 A Guarda	Municipal(mancomunada)	Hertzian
Galivisión TV do Morrazo	Private	Cable
TV de Pontevedra	Private	Hertzian
TV de Cangas (proxecto)	Private (AA.VV.)	Hertzian/Cable
Tv do Salnés	Private	Hertzian

The programming varies form one station to another, ranging from a minimum of two hours in a row to a maximum of twenty-four (TV Morrazo). Shorter programming grids are mostly made up of own production (talk shows, newscasts, sports, musicals). Longer grids are filled up with external production (films, animation, documentaries). When not broadcasting programmes, local televisions have recourse to teletext (TV Nigr n, telecidade), with local agendas and services, static advertising, own production or satellite connections.

- **Distributors and Exhibitors**

	Nº OF THEATRES
A CORUÑA	80
PONTEVEDRA	33
LUGO	26
OURENSE	17

	DISTRIBUCTION
A CORUÑA	**C Y B DISTRIBUCIÓNS** Rúa Constitución, 31-1º dta 15679 O Burgo. Cambre, A Coruña **DISTRIBUCIONES VALLE INCLÁN** Lubarci, S.L. Rúa República Arxentina, 48-7º 15706 Santiago (A Coruña) **EXCLUSIVAS BÁLGOMA, S.L.** Rúa Magistrado Manuel Artime, 26-1º 15004 A Coruña **U.I.P** Rúa San Vicente, 25-entrechán 15007 A Coruña
PONTEVEDRA	**BAÑOS FILMS, S.L.** Rúa Hernán Cortés, 13-baixo 36203 Vigo (Pontevedra) **Jesús Gómez-Cambronero, S.L.** Warner Española, SOGEPAQ Rúa Cuba, 26-baixo 36204-Pontevedra **VIDEO PUBLIK** Rúa García Camba, 14-1º esda. 36001 Pontevedra

d – The political and legal context

The Spanish television system is governed first by the Statute of Radio and Television (Law 14/ 1980, January 10th), that defines TVE as a public-owned company, independent of the government and assuming all duties of the State as regards public services of Radio and TV (article nº 5).

This legislation was added on to by the Law governing Telecommunications (Law 3/1987, December 18th) and the Law providing for the Third TV Channel (Law 46/1983, December 22nd), and further by the Law of Commercial Television (Law 10/1988 May 30th), the Law of Satellite Telecommunications (Law 37/1995, December 12th), Law of Local Television (Law 41/1995, December 22nd), the Law of Cable Television (Law 42/1995, December 22nd) amended by the Royal Decree 6/1996, June 7th.

Under the Law of the Third Television Channel (1983), the Galician Parliament agreed to establish CRTVG (Law 9/1984, July 11th). This third channel is mentioned under article 2.2 of the Law 4/80 January 10th (Statute...), that specifies that the Government may grant the Autonomous Regions, through approval by the Spanish Parliament, the direct management of a publicly owned television channel that is to be specifically established in each Autonomous Region.

The project was inspired by three principles:

1.- To implement what is provided for under the Statute of Autonomy.

2.- The de-centralising drive provided for by The Statute...

3.- To have a tool, key to the normalisation of Galician language and culture.

In the draft Law that established CRTVG, two key ideas were stated to justify the need for public Galician radio and television:

- Autonomous regional channels break through a situation of monopoly in matters of television.

- Public audio-visual media are of essence for any Region to assume its identity signs.

CRTVG is established for the Autonomous Region of Galicia, whose government is to regulate and manage the service of Broadcasting Radio and TV. CRTVG is registered as a Public institution.

The duties above are understood to be without prejudice to any competences that may lie with the Parliament and Government of Galicia and those that may lie with the Electoral Boards in times of election.

CRTVG has its own legal personality and full empowerment to pursue its objectives. It is to be governed by the regulations under Law 9/1984 whereby it was established.

In its outside legal relations, acquisition of fixed assets and labour matters it is subjected to Private law, without any other exceptions than those under the Law.

THE AUDIO-VISUAL SECTOR IN GALICIA
Production in 1994/1995/1996

The number of producer companies in Galicia at the end of 1997 was 70 (1) This includes four that are not active in production as their task is usually that of financial administration.

We shall divide this report into nine sections: general information, establishment of producers, employment, production 1994 through 1996, facilities and equipment, organisational structures, financial aspects, prospects for development and promotion.

The results of the survey and interviews conducted are also presented, and for those producers that did not co-operate in the study, the data were supplied by the Mercantile Register and other institutional and associational bodies.

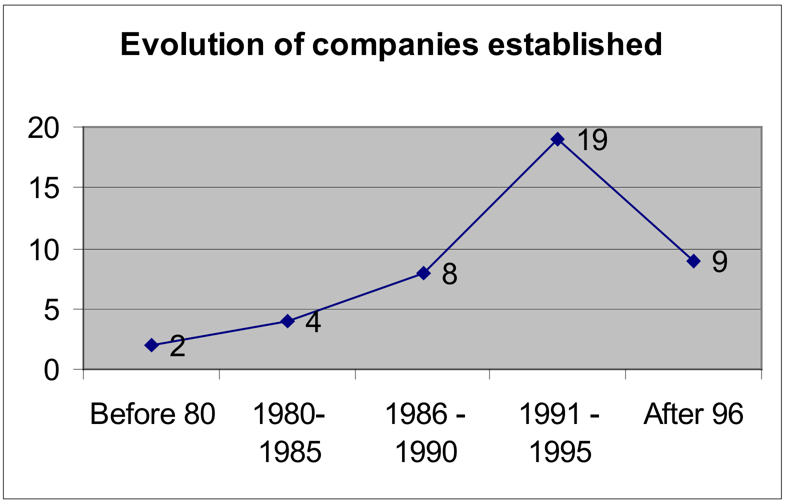
First of all the study highlights that although many of the companies started in the last few years had no effective production during the period surveyed, they prove the sector to be a dynamic one. It is also significant that queries relating to turnover or other economic issues obtained response rates below average. There are strong contrasts in business culture in the sector in matters of management, planning, professionalism, specialisation, or market knowledge. Some producers are well structured and have responded well to the survey: Arxila, Videozetra, CTV, Atlantis, Ophiusa or Continental, Logavideo, Zopilote and VideoVoz as well as TVG. TVE, on the other hand, disclosed no information whatsoever.

The effort to reach all producers, from those with accidental or spot production to those with stable activities, has shed light on existing differences that provide a clearer picture of the sector.

One of the first problems encountered by the research team was the difficulty to draw a list of all the producers that conform the Galician audio-visual space. Several sources were consulted, such as a list provided by the CGAI (Galician Centre for the Audio-visual Arts), the list of associated producers at AGAPI (Association of Independent Producers of Galicia). The resulting list of producers is a long one. Many of these companies were recently incorporated and lack production as of yet, and no financial information is available on them either.

1. GENERAL INFORMATION

Out of the 50 producers recorded on our database, the oldest one was founded in 1979 (ABRAGO FILMES). 4 % of the producers were established before 1980, another 6% appear between 1980 and 1985, and many more during the second half of the 1980's, accounting for 16% of producers. The true consolidation and impulse for the sector came in the 1990's. In the last six years, from 1990 to 1996, 27 new producers were established, that make up 54% of the companies in the sector today.



Size

According to the definition of Small and Medium sized companies in the Official Journal of the European Communities, according to the balance sheet and number of workers all of Galicia's producers fall under the category of Small companies (below 50 staff and 7 million Euros turnover), with the exception of TVG, that in 1996 turned over 2,566,954,176 Pts and employs 470, and so is a large company.

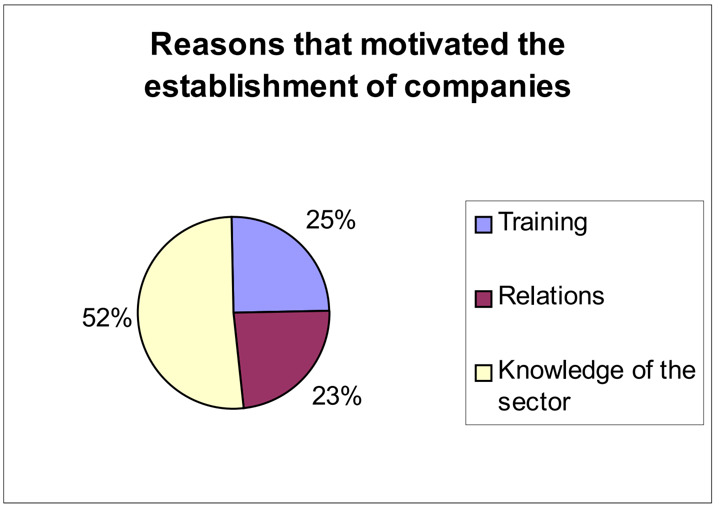
84% of the activities at these producers is production itself. Audio-visual service provision uses 52% of labour, and distribution, broadcasting and marketing account for 18% of labour.

Legal Status of Companies

S.A.	S.L.	S.B.	SELF-EMPLOYMENT	NO REPLY
14%	48%	2%	10%	26%

2. INFORMATION ON HOW THE PRODUCERS WERE CREATED

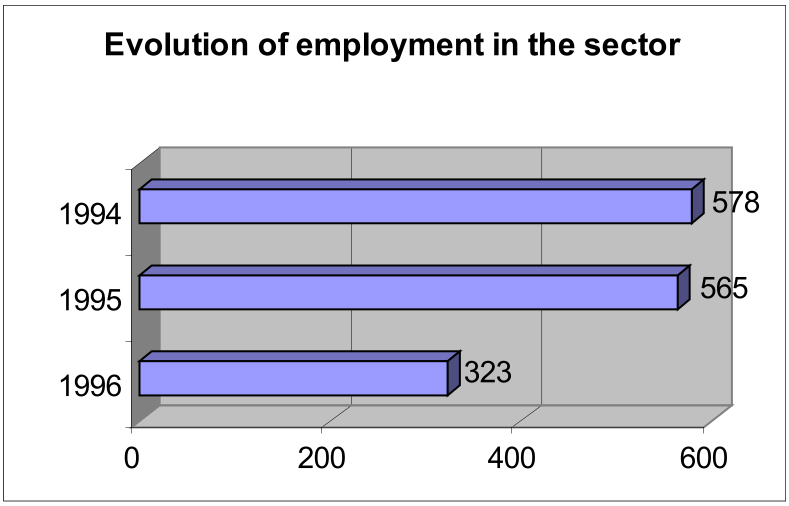
The main reasons that led most producers to become incorporated follow this order: knowledge about the sector, training and relations. In a summary hereafter relating to talks and interviews held with a group of relevant producers, we report their agreement as to the major motivation to establish each of their companies being the need to produce and realise their own creations. And so the lack of producers in the market led to the establishment of many self-producer companies.



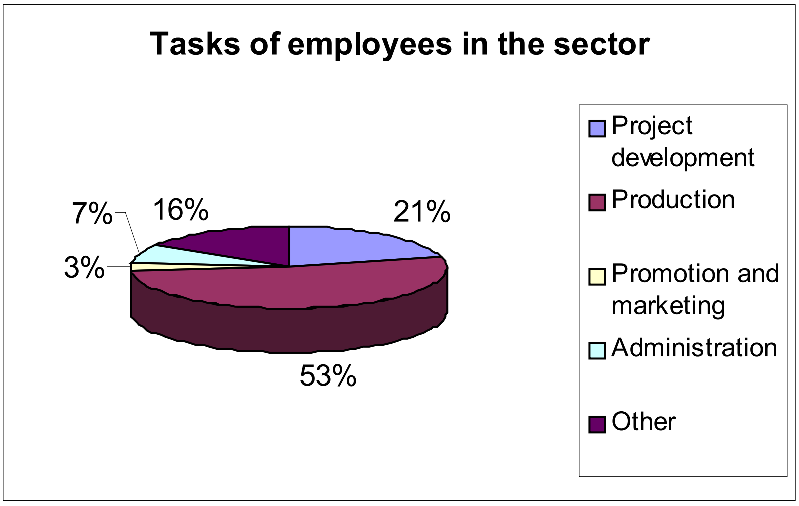
Only 14% of companies were granted some sort of subsidisation for start-up, mostly issuing from the Galician Department of Culture, Communication and Tourism.

30% of the partners to the producers surveyed also engage in other professional activities outside of the audio-visual sector, mostly teaching and liberal professions. This allows us to conclude that 70% of the people involved are fully dedicated to the audio-visual sector, and this indicates a certain degree of specialisation.

3. EMPLOYMENT



The main activities of the audio-visual companies are production, project development, administration, promotion and marketing. Most of the people working in the sector in Galicia assume production tasks (53 % of total employed), then follow project developers (21%), administrative staff (7%), and promotion/marketing and other (19%).



The number of trainees in the last few years reached 848, although half of them are on contract at CRTVG.

The number of temporary contracts has also risen much in these three years.

YEAR	1.994		1.995		1.996	
Technical staff, nº of days worked	Men	152	Men	123	Men	591
	Women	10	Women	299	Women	146
TOTAL	**162**		**422**		**737**	
Artistic staff, nº of days worked	Men	37	Men	43	Men	121
	Women	39	Women	50	Women	90
TOTAL	**76**		**93**		**211**	

Selection Criteria

When recruiting managerial positions and highly specialised technical staff, Galicia's audio-visual companies give priority to experience, academic curriculum and motivation. When it comes to engaging artists, the priorities are experience, fame and motivation. In the case of trainees, the most important thing is motivation and academic curriculum, in that order. As it may be seen, experience is a priority when engaging someone's services, but this holds back the chances for younger people to renew staffing. They may, however, enter the system as trainees.

Only 32% of the companies analysed have personnel training policies. The usual system is to hold short courses, organised by specialised companies.

4. AUDIO-VISUAL PRODUCTION

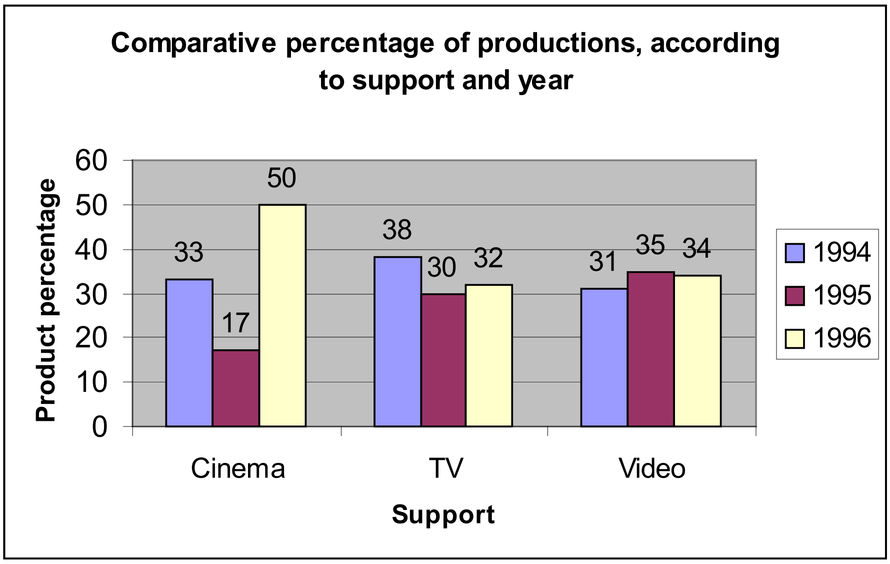
In the period going from 1994 to 1996, 285 productions were made in Galicia.

Detailed description of productions

The difference was established between cinema production, production of TV programmes and strictly audio-visual products. Under cinema we break down into feature films, medium length films, short films and animation. Under tv programmes, the range is wider and it specialises in genres: documentaries, reportage, information, studio programmes, entertainment, fiction, sports, educational, children's, video clips and outside broadcasts.

Under strictly audio-visual, there are institutional videos, videos made for private companies, advertising and multimedia.

Here are some details with a distribution of percentages of productions for the years 1994, 1995 and 1996, according to the classification above:



Hours produced

In the three-year period a total of 1673 hours were produced, This count excludes hours of broadcast giving coverage of sports and other events (religious, institutional), as well as daily newspieces. The whole of hours of film and video are accounted for, however: in 1994, a total of 359 hours, in 1995, 910 hours, and in 1996, 404 hours.

Aid to audio-visual production

Most aid to audio-visual production in Galicia is in the form of "subsidies to the aid of audio-visual production in Galician language" issuing from the Department of Communication, Culture and Tourism of the Regional Government of Galicia.

Subsidised production in 1994 was made with grants from 1993 amounting to 140 million Pts, awarded to short films, feature films, pilot tv programmes and video.

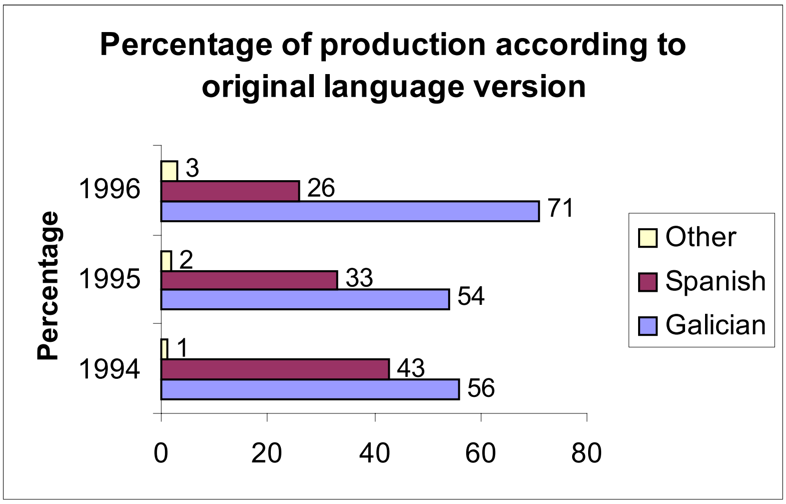
In 1994 no grants were provided for audio-visual production. In 1995, short and feature films were subsidised, for an amount lower than that of 1993. This time 62,650,724 pts was the total subsidised.

In 1996, aid is directed to project development and feature film production, for a total of 76,137,900 pts.

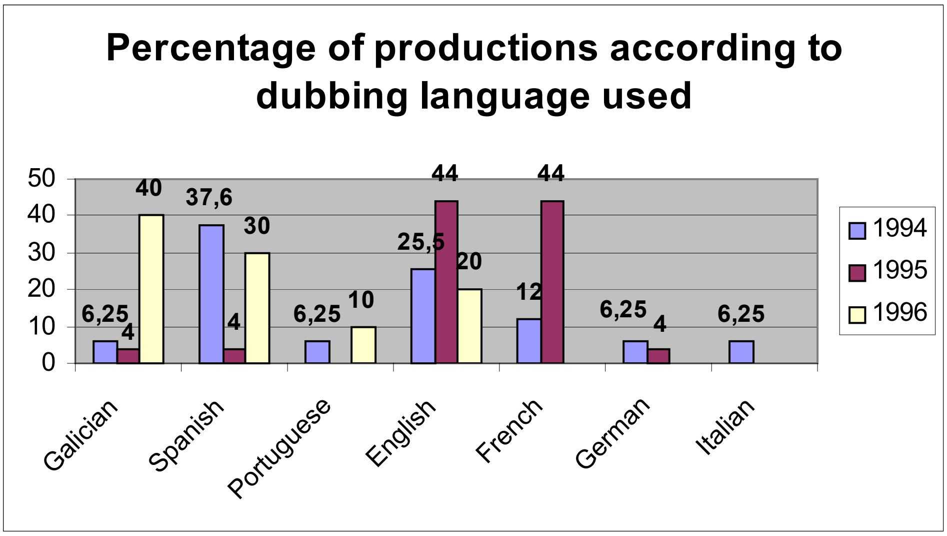
There is also a lesser contribution issuing from private institutions that adds up to less than 10% of the total.

Linguistic aspects

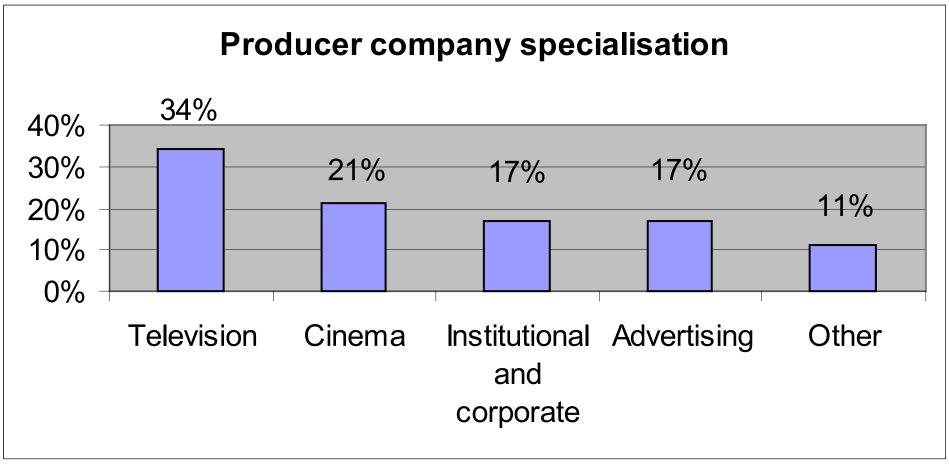
Original versions of Galician productions are made mostly in Galician (around 62%), with 35% originally made in Spanish. The remaining 3 % is made up of productions in Catalan, Basque and English languages.



Subtitling is practically non-existent, the odd production being usually into English. The system mostly used to translate Galician productions into other languages is dubbing: 33.3% into Spanish, 30% into Galician, 26% into English, 13 % into French and 6.6% into German.



Market niches (specialisation)



The major changes for production in the near future, as envisaged by the sector, converge mainly towards:

- projects for local television
- development of multimedia programmes

Nº of companies that own rights to the following types of productions

TYPE OF RIGHTS	PERCENTAGE OF PRODUCTIONS
Rights to public broadcasting and T.V.	22,5
Rights to theatrical distribution of feature films	10,5
Rights to video and other supports	66
Others	1

Production sold abroad

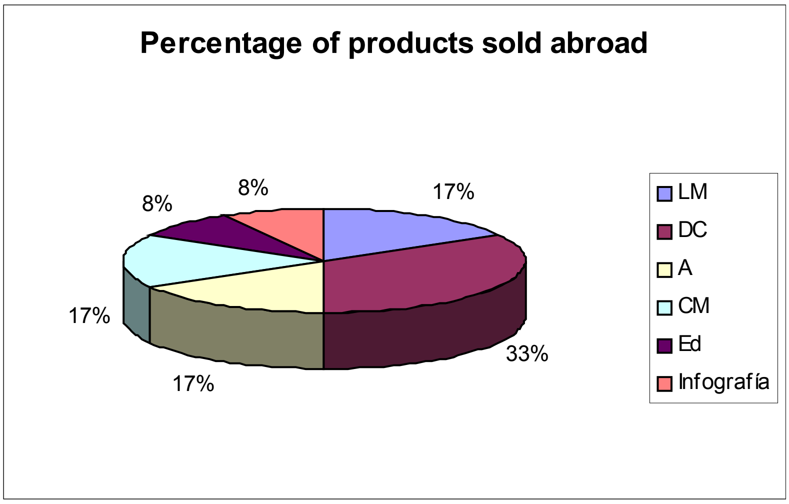
In the three years studied, 12 productions were sold abroad, totalling 9 hours of production. The main destinations were South America and Europe (the major buyer is Canal +)

The breakdown of sales per genres is as follows:

Cinema: two features and two short films

TV: Four documentaries, one educational programme and one animation.

Audiovisuals: programme signatures

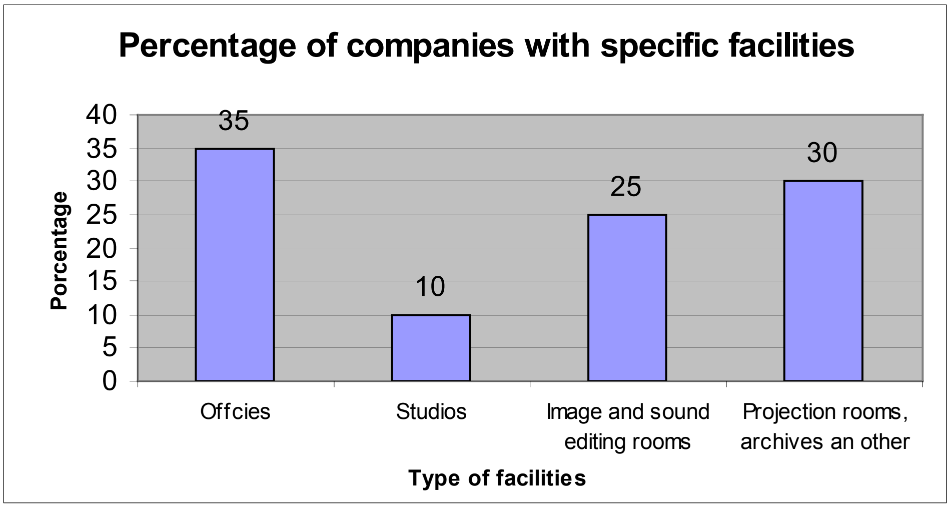


Awards

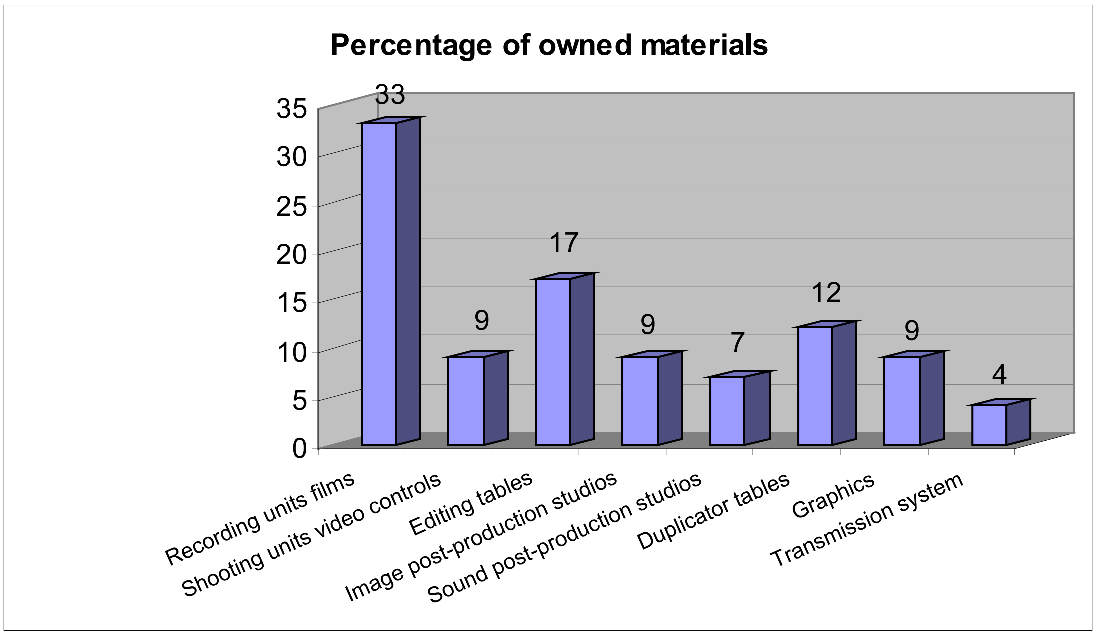
A total of 42 productions obtained national or international awards. Cinema was the one to receive most, especially considering that cinema production is far less than tv production. Advertising, documentaries, animation and creative video were the most successful Galician audio-visual productions abroad.

5. OFFICES AND EQUIPMENT

Practically all of Galician producers operate from rented or own premises, where there are at least the offices of the company. Where no true office exists, then the registered office acts as headquarters with archives and storage facilities. Producers usually lack specific installations for studios, projection rooms, interview sets and maintenance. Other producers have sound and image editing facilities on the premises.



Most companies own the cameras they use (The mostly used systems are Betacam SP and Betacam Digital, and sometimes Hi8) for indoor and on location shooting. Many companies also own video editing facilities (29%). Other companies choose to rent editing and post-production material (graphics, sound). It must be noted that although Galician producers may work with several recording units, they usually have one only unit for editing and post-production.



When it comes to renting equipment, the producers are conditioned by the type of production in each case. Thus, most cinema producer companies loan equipment from Madrid or Lisbon (including shooting equipment, film development, lighting and sound equipment, editing,...) and when doing video, the services are sought inside Galicia (IJV, CTV, Chisco, Faro TV, Adivina, ...)

The problems as seen by the producers that engage rented services are the low quality of the materials provided and sometimes even of the services hired, the situation being the worst for cinema.

6. ORGANISATIONAL STRUCTURES

None of the companies in the sector in Galicia belongs to any multinational holding company. There are two though, that are a part of other larger business groups: VideoVoz (belongs to the Group Voz) and CTV SA (belongs to the Group Araguaney).

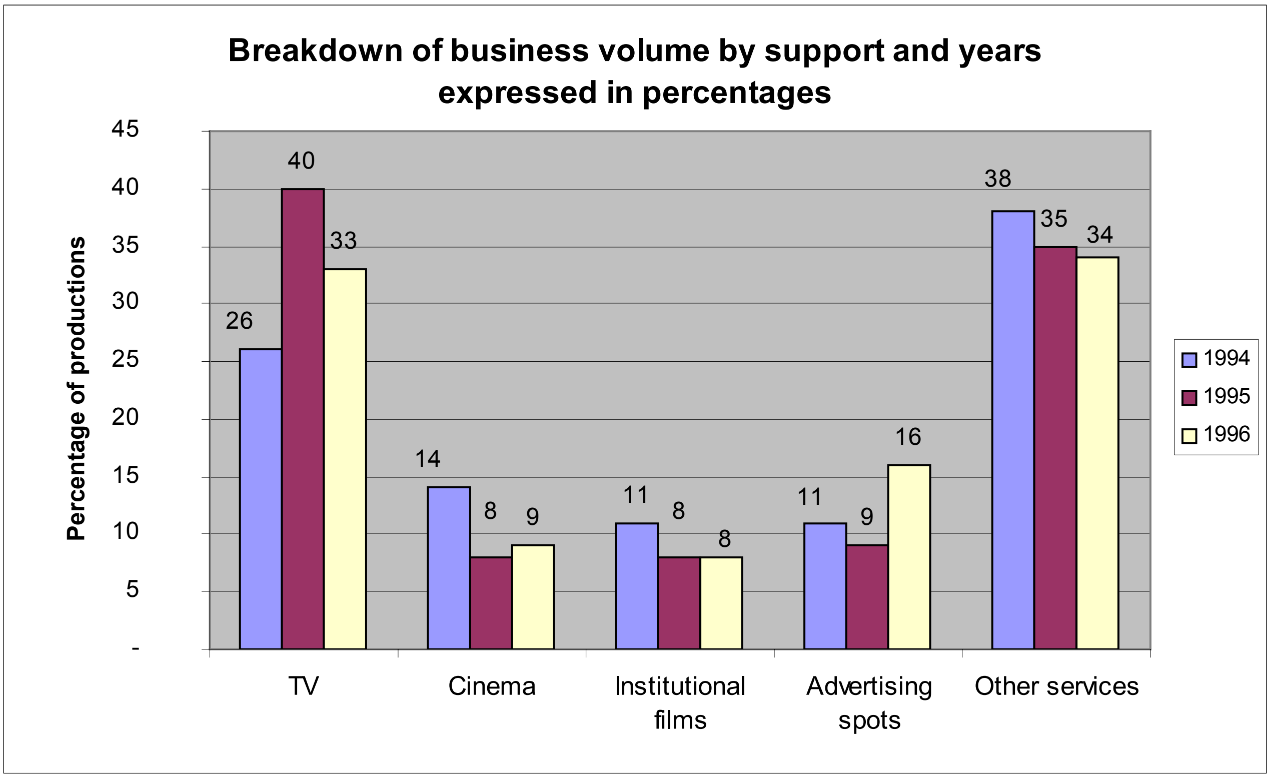
Only 11% of the companies hold stakes in other companies. This is the case of CTV, for example, that owns 100% of Intereuropa TV SA, located in Madrid, and Surco Comunicacion SA in Seville. There are, however, many spot agreements for specific productions (40% of companies surveyed state this as being a common strategy).

7. FINANCIAL ASPECTS

The overall turnover for the years 1994, 1995 and 1996 is explained in the following table, evidencing the potential for the sector in Galicia.

YEAR	1.994	1.995	1.996
Busines volume in pesetas	3.168.650.475	3.942.999.924	4.545.248.636
Busines volume in euros	18.879.894,62	23.493.731,37	27.082.133,53

Business volumes in percentage terms for types of production



Profitability

Out of the producers surveyed, 18 declared to have made a profit in the three year period, and 31 worked at a loss.

YEAR	1.994	1.995	1.996
Profit in pesetas	45.230.464	119.285.785	136.118.555
Profit in euros	269.498,45	710.745,17	811.040,53

The most common difficulties experienced by Galician producers when capitalising their investments are:

1.- Unreliability

2.- Instability

3.- Problems in subscribing to a loan (although 60 % of companies report being in good terms with bankers when negotiating for credit).

8. PROSPECTS FOR DEVELOPMENT

Once a producer company becomes established, sometimes a partner will decide to give up the business. Changes and new focus is given by some producers towards multimedia and local tvs market. Technological renovation brings about digitalisation of image and sound, during recording, editing, post-producing and broadcasting.

9. ORGANISATION OF PROMOTION, TRENDS IN DISTRIBUTION

Failure to respond to this section was prevalent across the survey. Nevertheless, all companies that are somehow involved in the distribution of their product (about 56%) work along a similar line: festivals, press releases, etc.

Most producers agree that the CGAI should act as the true promoter for the distribution of Galician audio-visual production.

SOME PERSONAL ASSESSMENTS FROM PRODUCERS IN GALICIA

Most producers in Galicia explain that the major reason behind the idea to establish their company lay in the need for many creative writers, directors or producers to pursue their own audio-visual projects. The need for training was also another reason to establish new companies.

New companies soon experience the usual problems, mainly to do with funding. There are many more, such as the lack of proper legislation, TVG's monopoly as sole consumer and broadcaster of audio-visual produce, and lack of qualification in the sector. And they all lead back to the main problem, undermining the confidence to invest in projects.

In spite of aiming at serving the market in Galicia, producers are unanimous as to the need to look for other markets too. Hence the demand by the professionals of a stronger, consolidated distribution system for the sector.

This problem is closely linked to the policies to aid production in Galicia. Most producers see public managers as incapable of proper policy-making in audio-visual matters. There is not much aid compared to other sectors, and what there is suffers from mismanagement, and there are examples to prove it.

The major demands expressed by the sector are: that proper laws be issued, that the relevant departments of the Galician Government take active part in promoting the sector, that TVG be committed to broadcast a quota of independent Galician productions, that an autonomous agency be established to govern the sector and promote the productions outside of Galicia, that there be proper training, both of managers and artists, needing a school of further education in audio-visual studies and a drama school.

Most of the producers interviewed confirm their participation at several associations. AGAPI (Association of Independent Producers of Galicia) is the one with widest membership. There is strong membership to other associations, namely FAPAE and EGEDA.

Most producers see it positive to belong to an association, although in some cases they report lack of consistent relations between the associations and the overall sector.

More involvement, better business practice and agreements with public institutions are some of the main objectives that should be pursued by these associations, the producers say.

When it comes to investment in technical equipment, most producers seek lines of funding through IGAPE (Galician Institute for Small Companies), as well as at bankers.

The voice of the producers in Galicia is a critical one as regards official policy -practically non-existent, albeit confident in future recognition of the importance of the sector.

THE WALES CONTEXT

a. Introduction

Wales is a small country of around 8,000 square miles with the sea on three sides and its bigger neighbour, England, on its eastern side. It forms a part of the United Kingdom of Scotland, England, Wales and Northern Ireland. It is a particularly mountainous country with a strip of lower ground on its coastal strip. Although the whole country has hills and mountains, the largest and highest are in North Wales with Yr Wyddfa, Snowdon (3,650 feet above sea level) the second highest mountain in the United Kingdom.

Most of the population of 2 million, 700 thousand live in the industrialised valleys of south Wales and in the large towns and cities such as Newport, Cardiff, Port Talbot, Swansea and Llanelli. There are other substantial conurbations in the industrialised North East and along the coast of North Wales. Until the last quarter of the twentieth century, the main activities were heavy industries such as slate quarrying in the North and coal mining and steel works in the South coupled with farming in the less industrialised areas. With the demise of the traditional heavy industries, Wales has suffered acute unemployment problems within its traditional areas of heavy population. (As late as 1973, there were 34,000 miners in Wales, almost all of whom were to lose their jobs.) Labour problems have been exacerbated recently by the farming crisis in the less populated areas. In the industrialised regions, the demise of the mining and steel industries has been accompanied by a drive for inward investment from overseas companies. Wales now has one of the highest figures for inward investment from Japanese companies, including television and car manufacturers, who have found a large workforce with a strong corporate loyalty. Since our study looks at the audio-visual sector in particular, it is worth noting that Sony and Panasonic have substantial factories in South East Wales and that the electronics giant Lucky Goldstar from Korea is currently developing one of its largest manufacturing bases near Newport at a cost of £1.7bn. As digital television unfolds, Wales will have a substantial part to play in manufacturing digital televisions and decoders for the whole of the United Kingdom.

History and Politics

Politically, Wales has a long history of being ruled by others. In the early years of the first Millennium, Celtic people were present in Wales who spoke a language related to Cornish and Breton. They were here when Julius Caesar landed in 55 BC and the two cultures, that of the Romans and the Celts co-existed for four centuries.

There are still areas of Wales, Segontium in Caernarfon, Maridunum in Carmarthen , Isca in Caerleonetc where the remains of Roman forts and amphitheatres can be found. When William the Conqueror came in 1066, there began a long tradition of building castles in order to try to bring the Welsh under governance. The next three centuries see the rise of the great thrust of castle building in Wales, The great castles of Caernarfon , Pembroke, and later Caerphilly were built in order to govern and to dominate. The Welsh castles in the hills and mountainous country e.g. Dolbadarn in the North near Llanberis and Carreg Cennnen in the South by Llandeilo were built in order to sustain what modern terminology would call guerrilla warfare. By now most of these castles are under the body, Cadw, (To

Keep) which is answerable to the Secretary of State for Wales for their preservation and for being open to the public.

Although Wales was never unified in its approach to external domination, Llywelyn Fawr and his nephew Llywelyn ap Gruffydd, fought to unify a substantial part of the region. Later Owain Glyndwr (Shaekspeare's Glendower) led one of the last substantial rebellions, proclaiming a Senate in Machynlleth and laying plans for a Welsh University on the lines of Oxford and Cambridge. Owain Glyndwr died in 1416. Ironically in 1485 a Welsh-born prince, Henry Tudor conquered Richard III at the battle of Bosworth. Gradually, Wales became part of the desire of some of the ruling classes to see themselves as part of Britain and indeed to see themselves as part of a British ruling class. By 1536 the Act of Union was passed to unite the two countries with English as the dominant language of Government. Wales lost its abilities to make independent law (where it had been in the vanguard of female rights to property and rights on marriage). On the other hand, it became part over many centuries of an uneasy and shifting alliance. Wales has had a long tradition of ministers who have served the Government of the United Kingdom, including the Welsh man Lloyd George who was Prime Minister and who laid the foundation of the National Insurance and Pension Scheme and the Labour Leader Aneurin Bevan who is credited with founding the Health Service. In 1979 Welsh people voted against a regional Assembly. It was not until September 18th 1997 that a majority was gained for a Welsh Assembly, which will begin its work in 1999. Sixty new members of the Welsh Assembly will be elected in May and the current budget of £7bn which is administered by the Welsh Office for education, transport, housing, the arts, industrial development etc will become the budget of the new body. It is fair to say that the new Assembly was created as a result of a new alliance between the Labour Party led by the Secretary of State, Ron Davies, the Liberal Democrats and Plaid Cymru who all campaigned for the Assembly. Plaid Cymru, the Nationalist Party, had also campaigned consistently over the years not only for economic development but also for cultural development including the status of the Welsh Language.

b. The linguistic situation

During the half century between 1931 and 1981 the number of speakers of Welsh declined from 909,261 to 508,207. That this decline was arrested by the 1991 Census was due in no small measure to the campaign for Welsh medium education and for Welsh to be taught to all pupils.The educationalist, Professor Colin Baker remarks: “The development of bilingual education in Wales is not a purely educationally derived phenomenon. It does not derive from simple arguments about the educational virtues of bilingual education. Rather, such growth is both an action and reaction in the general growth of consciousness about the virtues of preserving the indigenous language and culture.” (*The Growth of Bilingual Education in the Secondary Schools of Wales).*

In 1939, the first designated Welsh medium primary school was opened in Aberystwyth as an independent school sponsored by Urdd Gobaith Cymru , the Welsh League of Youth. Ysgol Glan Clwyd was opened in 1956 as an officially designated Welsh medium secondary school under the Local Authority. In the forty years since 1956 there has been a consistent high growth in the number of Welsh-medium primary and secondary schools in all areas of Wales, but there has also been a growth in the teaching of Welsh in all other schools. By 1994, over twelve per cent of pupils in Welsh schools (20,962) were being taught Welsh as a first language and over sixty six per cent (114,883) were learning it as a second language.

In addition to the thrust for Welsh-medium education, there was also a desire to see Welsh enjoying equal status with English. The Welsh poet and playwright, Saunders Lewis called for revolutionary means on 13 February 1962 in his broadcast lecture Tynged yr Iaith (The Fate of the Language). This led to the formation of Cymdeithas yr Iaith, the Welsh Language Society and a spate of non-violent protest. Other players moved within political and administrative spheres to further the same aim. In 1967 a Welsh Language Act allowed the language to be used on official forms. The Bowen Report of 1972 approved the use of bilingual road signs. The Welsh Language Act of 1993 gave the statutory Welsh Language Board powers to promote and facilitate the use of the Welsh Language and to ensure that public bodies treat the Welsh and English languages equally.

The population of Wales at the last Census count in 1991 was 2,724,000 aged 3 and over. Of these, 19% (508,000) spoke Welsh, 16% (445,000) read Welsh and 14% (385,000) wrote Welsh. Some 14% (370,000) spoke, read and wrote Welsh. In addition to the 19% (508,000)who speak Welsh, it is generally estimated that another 300,00 may understand some Welsh. These figures relate solely to Wales since the language question is not asked of Welsh speakers resident in England, Scotland or

Northern Ireland. In terms of television and radio, this may be an important question since satellite communication will enable greater penetration of the population of the United Kingdom as a whole.

c. The media system

- **Hertzian television**

The BBC

Broadcasting began in Wales at 5p.m. on 13 February 1923 in a small room above a cinema in Castle Street, Cardiff. During the early days of radio broadcasting very little Welsh was to be heard on the air and programmes followed the pattern set by the London Headquarters. In 1925 a British Broadcasting Corporation was set up, funded by the licence fee and incorporated by Royal Charter. This new body consistently showed a lack of sympathy for Welsh Language broadcasting and during the 1930s pressure increased upon to BBC to recognise Wales as a nation with its own cultural and linguistic needs. In 1935 the BBC appointed a number of Welsh speakers to key positions in North and South Wales and finally in July 1937 the Corporation acknowledged Wales as a separate region with its own wavelength. At the end of the war in July 1945 the Welsh Home Service was established.. Calls continued for the establishment of National Broadcasting Councils for Scotland Wales and Northern Ireland and the Broadcasting Council for Wales met for the first time on 6 January 1953 in Cardiff.

The present structure of the BBC in Wales still has a Broadcasting Council which is chaired by the National Governor for Wales who is also a member of the Board of Governors of the BBC for the whole of Britain.Thus the BBC recognises Scotland, Wales and Northern Ireland as national regions. The Board of Governors remains the ultimate authority for the BBC in all regions and is self-regulatory.

By 1959 half the households in Wales possessed television licences The 50s saw the advent of the opt-out system within the television service of the BBC whereby a national region such as Wales would opt out of the British network service at certain times to broadcast programmes of regional interest. By 1967 the Corporation had moved to new studios in Llandaf in Cardiff, a move which reflected the growing output of the BBC in Wales.By 1977 two full radio stations, Radio Cymru in Welsh and Radio Wales in English were established. In 1982, when the Welsh Language Channel, S4C was established, the Welsh language output of BBC television was broadcast on S4C while the English language output continued as an opt out service on the main BBC network.

Currently,BBC Wales is responsible for four broadcasting services at a cost of £47.4 million. They are:

BBC Wales Television

At least ten hours per week of English language television for Wales scheduled across BBC1 and BBC2 incorporating news, current affairs, sport, factual programmes, light entertainment, documentaries, drama and the arts. In addition BBC Wales produces television and radio programmes for the BBC's national networks. Television highlights in recent years have included the Cardiff Singer of the World competition, documentaries and drama.The current expenditure on BBC Wales is £16.1million. The produced output hours per year are 583 hours and the cost per hour is £28,000.

BBC Cymru on S4C

Ten hours per week of Welsh language television programmes under the terms of the Broadcasting Act 1990 "to the reasonable requirements of S4C". This includes a news and current affairs service working to an international agenda, the daily soap opera *Pobol y Cwm* , sport, factual programming , music and the arts. The current expenditure on BBC Cymru on S4C is £16.3 million. The produced output hours per year are 512 and the cost per hour is £32,000.

BBC Radio Cymru (FM)

A national radio service in the Welsh language. One hundred hours per week, transmitting daily, and incorporating a comprehensive news and current affairs service, together with a full range of sport, information, feature programming, drama, popular music and entertainment. The current expenditure for Radio Cymru is £7.7 million and the produced output hours are 6,292 hours per year. The cost per hour is £1,200.

BBC Radio Wales (MW)

A speech led national radio service in the English language, broadcasting daily again for one hundred hours per week including a full news and current affairs service, sport, music , entertainment, drama and documentaries.The expenditure on Radio Wales is £7.6 million and the produced output hours are 5832. The cost per hour is £1,300.

In addition, BBC Wales sustains Wales's only professional symphony orchestra. It is the only BBC Orchestra which has a partnership arrangement with one of the Arts Councils and it raises more sponsorship than any other BBC orchestra. BBC National Orchestra of Wales gives more than 70 public concerts every year in Wales; it broadcasts regularly on radio and television, and frequently visits overseas countries on tour.

BBC Wales produced 25 hours of programming on the British network in 1995/6 and the same number in 1996/7 on BBC1 and BBC2. During 1996/7 the BBC in Wales produced 428 hours of radio for the British networks, the majority by far on Radio Three which specialises in classical music and which broadcast the National Orchestra.

Staff numbers in BBC Cymru/Wales for 1996/7 were 539 people in broadcasting services and 375 in facilities. The Headquarters and main studios of the BBC are in Cardiff . There is a substantial presence in North Wales and other smaller studios (see map).

Commercial Television

The BBC enjoyed a monopoly to broadcast in Britain on radio and television until a White Paper in 1952 on broadcasting included the revolutionary statement:

"The present government have come to the conclusion that in the expanding field of television, provision should be made to permit some element of competition"

By July 1954 the new Television Act had been passed and the ITA , the regulatory body for independent television (now renamed the ITC) had been established. This body was set up to ensure a federal structure for commercial television whereby regional companies would compete for a franchise to serve specific regions of Britain. Unfortunately in Wales that region consisted in the first licence round of an amalgamation of the South West of England and Wales. This company was Television Wales and the West, TWW. It was 1958 before the first programmes were broadcast and after intense lobbying by devotees of the language, TWW began with a commitment of one hour of Welsh a week at least in its regional programming.

In 1962 another smaller Welsh language company , Teledu Cymru, was set up to broadcast to North and West Wales. Despite high hopes, the company was burdened by the harsh requirement in its licence to produce 30 hours a week of programming as compared to the 12 or even 7 hours required of other companies. Teledu Cymru broadcast four and a half hours of Welsh programming a week and bought in more hours from Granada. By 1964 the debt of the company was such that the sensible solution was achieved of merging TWW and Teledu Cymru so that at last Wales was one region, even if it was linked to the South West of Britain. TWW developed two strands of programming , one in Welsh and one in English. By 1967 despite a buoyant income and twelve hours of programming a week, they lost their licence to a new company, Harlech Television or HTV.

HTV went on air on the fourth of March 1968 and this year celebrates its thirtieth year. Despite repeated attempts by other companies to bid for the licence, in 1980 for example and then subsequently in 1991, it has held on to its franchise. One of the reasons for its success in gaining the licence in the first place was the emphasis it put on having a regional headquarters for senior board and managers and a strong regional flavour to its programming. By 1977 for example, it was producing 500 hours of programmes a year with 306 of those in the Welsh language and the greatest increases were seen in the field of Welsh language programmes for children.

These were years of growth for HTV as for all commercial companies. As the electricity grid was finalised in the Sixties, the whole country could take advantage of the new technology, electric fires, electric kettles and of course television, things which we all take for granted. In 1960, 60% of Welsh homes had a television set. By 1969 the percentage had risen to 92%. The effect on advertising revenue can be gauged by this dramatic increase in the availability of the audience. These were indeed golden years in terms of an increase in revenue.

HTV Wales currently produces over 11 hours of English language regional programmes a week, including regional news, factual and light entertainment programmes.This is broadcast in a very similar way to the BBC's English programmes i.e. as regional opt outs from the ITV network programming for the whole of Britain, HTV also sells its Welsh language programmes to S4C and the number of hours has fluctuated from a heavy reliance in the early years to a figure of an average of three hours a week at the current time. These include a strong strand of current affairs programming and light entertainment including factual light entertainment such as a holiday programme. In addition, HTV and S4C co-operated in acquiring the rights to show rugby in Wales - a national pastime that some regard as equivalent to a religion!

In 1997 HTV lost its independent status, not through losing a franchise or licensing bid but by accepting an offer from a large media group, United News and Media chaired by Lord Hollick.The acquisition is symptomatic of the growing trend in the independent commercial companies in Britain towards a streamlined small group of powerful companies serving several regions as distinct from the older pattern of a variety of large and small operators serving distinct areas.In fairness to the new company United News and Media, the group made a commitment to the regional newsroom and a further commitment to producing at least one major feature film a year from Wales. It has subsequently advertised and filled the post of Drama animateur with an eminent independent Drama director.

HTV's status under the ITC

HTV under United News and Media is still a company holding an individual licence on franchise from the ITC, the Independent Television Commission. Licensees in Britain, although commercial operators, still work under stringent public service expectations as to the nature of their programming (the mix of information and entertainment as well as quality thresholds).Furthermore, commercial producers holding licences from the ITC have to confirm to the regulatory structure issued in the ITC's code . This includes detailed comments on matters of taste, decency, violence, undue prominence to commercial goods, political neutrality in terms of a political documentary or a programme on a major industrial dispute, etc. Transgression will result in a reprimand or even a substantial fine. This is an example of the way in which commercial television in Britain has developed as a quasi public service concept. The reason for this, no doubt, has been the scarcity of airtime available to all operators (until digitalisation) and the consequent ease with which a small number of companies could be regulated. It may well be that the increased channels arising from new digital technology will lead to a different form of regulation. Discussions to this end are already taking place within Europe.

The ITC has an office in Cardiff and a regional Head and staff who survey the output of HTV.

S4C

S4C was established in the 1981 Broadcasting Act in response to demands from both linguistic communities in Wales that there should be a dedicated Welsh language channel and that other broadcasters should be freed of their obligation to carry programmes in Welsh. Those opposed to Welsh language broadcasting in Wales at the time felt a sense of aggravation in being deprived of British programmes at certain times in the evening so as to make room for Welsh language programmes. Welsh language activists believed that such programming, often carried late in the evening or in hours outside prime time, did not foster the culture or create a valid modern experience for young people. The Crawford Committee Report of 1974 advocated using the newly developed fourth channel to broadcast a Welsh language channel in Wales. After much pressurising in the form of symbolic gestures such as the refusal to pay license fees, physical gestures such as climbing transmitters, and a powerful gesture by the then leader of Plaid Cymru, Gwynfor Evans, who threatened to starve to death for the Channel, the new Conservative Government decided to agree. S4C therefore began broadcasting on 1 November 1982. At the time only one extra analogue channel was available and S4C was charged with the duty of providing a wide range of programmes mainly in the Welsh language in peak viewing hours while showing as many as possible of Channel 4's programmes outside those hours. This took the heat out of a divisive situation and contributed a great deal to social harmony in Wales between the two languages.

S4C was and remains a unique experiment within British television. Programmes from commercial television, HTV , co-exist with BBC programmes on the same channel. BBC programmes, which formed a core part of S4C's output in that the BBC developed international and national news in Welsh, were broadcast on a channel which also carried advertisements. More significantly in the long term, S4C, just like Channel 4, was a new breed of television channel. It was a publisher rather than a producer. Up to 1982, the BBC and HTV in Wales had been major production companies with their own studios and their own producers and technical and creative staff. S4C and Channel 4 had no studios and no technical staff other than those charged with the duty of putting the Channel on air. Instead, they were the first publishing houses within British television, commissioning work from independent producers, scheduling the work and broadcasting it within a branded channel. Their staff were not producers but commissioning editors, cost controllers, schedulers and contract lawyers. In this new climate, small production houses grew and independent producers flourished. It is not an overstatement to state that a country, which had traditionally thought of itself as producing teachers and ministers, took to the world of business.

Nevertheless, this world of business was a protected world in the sense that producers did not run a financial risk. S4C commissioned and paid in full for individual series. On the other hand, because payment was in full, the producers on the whole did not retain rights and did not develop a wider commercial structure.

Today, S4C, with the new Media Agency, Sgrin, promotes and sells programmes and distribution overseas on behalf of the independent producers. The Cannes Film Festival, for instance, sees a joint effort by S4C, Sgrin, TAC- the independent producers'guild, and the new Film Commissions who sell locations in Wales. Links are also developed with Scottish Screen, the Northern Ireland Film Commission and with the BFI. These are of considerable importance in developing a film culture based on at least one Welsh language theatrical release each year. In 1994, the film Hedd Wyn was nominated for an Oscar in the best foreign language film category; in 1998, a short animation, The Famous Fred, was nominated for Best Short Animation, again for an Oscar. The Animated Shakespeares and the Animated Operas and Old Testament have sold to over sixty countries and the current Jesus Story, a ninety minute feature film, is expected to be a major success over the Millennium Christmas.Currently, S4C raises in excess of £10m from co-productions, sales to overseas countries and selling airtime for advertising.

These additional funds are of vital importance to the Channel.Its current revenue funding from Government is £73m per annum and is linked to the Retail Price Index.

Since the television sector has high employment costs, which are higher than RPI, additional income will help to sustain the current funding levels. The 1996 Broadcasting Act gave S4C the right to develop along more commercial lines in order to maximise its income.

S4C currently runs a service for approximately four hours a day during peak time but will run an all day service on digital television when it will not have to share its space with Channel 4. The service is high quality television in the sense that it strives to be national rather than regional. The BBC's news gathering service helps to bring a truly international dimension to the screen with reporters in the Sudan and Bosnia as well as Northern Ireland. Idents are professional. There is a considerable amount of high quality drama series and substantial current affairs documentaries produced by the BBC and HTV. The Channel's professionalism is vital; it is on air in a bilingual country side by side with some of the world's most professional broadcasters. On the other hand, one of the most interesting arguments over the past few years has been the register of language. How can one accommodate those who seek to get a high quality professional service in the Welsh language and at the same time accommodate those who are learning or who are in mixed language families. All broadcasters in Wales, not just S4C grapple with these problems on a daily basis.With the advent of digital, there will be further problems of gaining an audience in a multi-channel world.

S4C is an independent Regulatory Authority with a duty to operate its programme service in line with the ITC Programme Code. The Welsh language output is subject to regulation by its Authority on this basis/ Since 75% of the output contains Channel 4 programmes which have been prepared for a Channel licensed and regulated by the ITC, its main responsibility for this part of the output is the effect of rescheduling the programmes.

- **Cable and Satellite**

Over the past five years, the uptake of Satellite in Wales has surpassed expectations with one fifth of households subscribing to Sky, the satellite channels. Part of this attraction has been the fact that sport is a major component of the Satellite Channels including the Premier League and Cricket. On the other hand, part of Sky's attraction must be the freedom from the four or five terrestrial channels into a multi Channel world. Sky offers the freedom to tune in to news and to sport as one wishes during the day and night, thus making the audience their own personal scheduler. Similarly, Cable has been making major inroads in South Wales where CableTel, a division of NTL, has been remarkably successful in persuading households to subscribe to combined television and telephone services. Unfortunately, however, much of mid Wales seems unlikely to receive cable for many years since the centres of population are not large enough to justify the initial outlay.

- **Digital Terrestrial**

From the end of 1998, television viewers in the United Kingdom will be able to receive many more channels through digital terrestrial transmission. The available bit capacity has been allocated into 6 Multiplexes of 24 megabits, each capable of transmitting at least 6new channels and possibly many more as channel compression becomes available. Two multiplexes have been allocated to the BBC and ITV respectively and will transmit the current analogue channels and extra channels. Three multiplexes have been given to BDB whose main shareholders are Carlton and Granada. A consortium of S4C, United News and Media and NTL, named SDN won the final licence. On this Multiplex, the new Welsh digital service, which will run all day, will be broadcast. The BBC will also have additional hours for regional programming. S4C has also signalled that it is retaining extra capacity in order to consider the possibility of an English channel for Wales.

At first sight, therefore, the new digital future holds out the promise of an increase in programming for Wales in Welsh and English. There are problems, however. Much if not all of this new programming will have to be done on existing finance or paid for through commercial ventures. The most difficult problem is that of transmission. Because of the mountainous nature of the country and the fact that Wales has many low-power booster transmitters, it is possible that quite substantial areas of the country may not be covered. The 90% roll out of DTT, which will be achieved, on an UK basis within three years conceals the fact that in many parts of Wales, as elsewhere in the UK, there will be areas of considerable deprivation. This will have to be addressed before the present analogue service can be switched off and it will have to be addressed not only in Wales but also in many rural and sparsely populated areas of Europe

Despite the problems, digital terrestrial will also bring with it the convergence between television and computers so that television and Web services will be available on the same set. There is no doubt that we are at the beginning of a revolution in the way we approach programming and that television in the United Kingdom will be very different indeed in ten years time.

THE AUDIO-VISUAL SECTOR IN WALES
Production in 1994/1995/1996

One difficulty that manifested itself very quickly in preparing this report was the task of quantifying the precise number of companies operating in the Welsh-language television sector in Wales at any one time. Since S4C is a publishing house commissioning programmes from independent producers, the number of small producers varies according to the commissioning requirements. Some are set up to behave as long-term businesses; others are very small companies –sometimes consisting of two people or even a single person- which are set up to operate a single commission; others re-group with different partners in accordance with programming requirements. .

In addition, no list of Welsh-language independent companies gives the full picture of production in Wales. As we have discussed in the introductory context to Wales, Welsh production also involves the BBC in Wales who produce in Welsh and English and HTV who produce in Welsh for S4C and in English for its own regional service. The BBC and HTV are also constrained by law to give 25% of their production to independent producers. As a result, there are other production companies who work solely in English and who may be registered with the British association for independent producers, PACT.

There are also post-production companies, some working on major animation co-production, and several large facilities houses including the merged Barcud (North Wales) and Derwen (South Wales), now called Barcud/Derwen and M4. There is also radio, produced mainly by the BBC but, since 1990, there has been a growth in independent local radio throughout Wales. In addition: the cable company Cabletel (part of the company NTL) is based in Cardiff. The exploration of all these companies would have required resources far beyond the scope of this review. The study has therefore confined itself to those independent producers working within Welsh language television whilst including in the contextual introduction the work of the major broadcaster BBC and independent company HTV who also supply hours for S4C.

The second main difficulty in exploring the statistical picture was the rate of response to our questionnaires. The television sector is traditionally a difficult sector from which to gain responses. A study by Fuller-Love, Jones and Peel, *The Impact of Small Business in Wales (1998)* had a response rate of 47% and 28% for two sets of questionnaires. Our response rate was precisely 50% of those companies who had been awarded contracts in the current year, with some major omissions. Our response rate over the whole field as far as we could judge the number of companies (see above) was 32%. In addition, two researchers held interviews with the companies who had responded in order to provide more in-depth sessions, in particular to ascertain attitudes towards the industry and to pinpoint difficulties or challenges. Further information was received from other research, for example the work done by Fuller-Love, Jones and Peel, research done by J. Medhurst on the ITV franchise companies, from the secretariat of BBC Wales and from the annual accounts and report of S4C.

Thirdly, the situation in Wales, when this report was carried out presented special difficulties. S4C had decided upon a policy of expansion in the new digital service from its current constrained 3 to 4 hours a day to almost 12 hours a day. In order to achieve this expansion within its current budget, S4C decided to limit production companies to constrained budgets and to achieve savings through longer strands and longer-term security; it also wished to limit the number of companies with which it dealt by having a clustering of current companies. Some, though not all, of these ambitions were achieved; on the other hand, there were casualties of the system and an atmosphere of resentment of change. In such a time of radical change of systems, it is not always easy to get questionnaires answered on performance over the past three years from those who no longer see themselves earning a living in the current year.

Whilst engaged upon the latter part of this research, the Group Leader, Elan Closs Stephens, was appointed the Chair of S4C, a salaried position with responsibility for an overall view of accountability and policy in relation to the Channel. In order to protect herself against any conflict of interest, she decided that only those figures currently in the public domain could be available to her and that she could not use any inside statistical information. On the other hand, it is hoped that this limitation is compensated for by the additional insight that comes from a close relationship with a complex world. Providing quality television within a minority language is a difficult task which is made even more difficult by having to co-habit with a neighbour i.e. English language television, that prides itself on being a world-wide service of quality and is, indeed able to manifest that quality through substantial programme budgets.

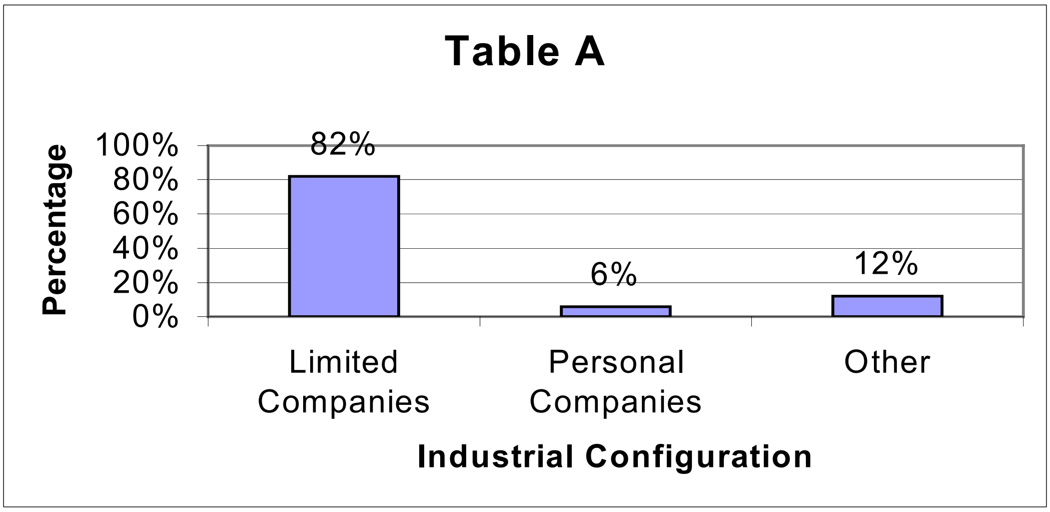
1. GENERAL INFORMATION

The current list of TAC, the society for independent producers in Welsh, lists 101 companies and there is at least one very substantial company (possibly one of the very largest, Agenda) who operates outside TAC membership. In addition, it is possible to list at least 20 companies who are no longer members of TAC and who may not be in receipt of any commission from S4C; they may be either dormant or defunct. 39 companies are working this year (97-98) for S4C; some others may be working for the

BBC or HTV but many may be dormant in television production terms for this year, or searching for other work for the future.

Of those currently working for S4C who answered our questionnaires, all companies (100%) were involved in production of television programmes for transmission; none were involved exclusively with audio-visual activities such as promotion or in-house videos. These were provided more often as a minor addition to the major activities of the television companies. On the other hand, 24% of the companies were involved in trying to promote and to distribute their own programmes or to find work outside their core activity with S4C. Thus the companies appear to be partially motivated towards a fuller enterprise culture`

On the question of industrial configuration, the similarities between own study and that of Fuller-Love, Jones and Peel, are remarkable. Their study listed 81% and ours 82 % of the companies as limited companies. 6% were personal. But there were some interesting variations: Teliesin was the only company in Wales to have set itself up as a co-operative under the Industrial and Prominent Society Act and this reflects its work ethos. One company, Creu Cof, was a limited company by warrant with charitable status; once again this reflects the company's view of itself as a company that reflects and records communities.



2. INFORMATION ON HOW THE PRODUCERS WERE CREATED

Further interviews brought to light the view of three distinct periods in independent production. Producers who set up in the early years of 1980s came mainly from the industry and their locations were Cardiff or the Caernarvon area in North Wales where a cluster of independent companies and a facilities house were established. There was a further broadening of this base in the early 1990s when HTV was forced to shed many staff following an expensive franchise round.

At the same time, S4C was instrumental in setting up a South West Wales base in Swansea with Agenda television, catering for an audience which seemed to be under-represented. This widened the number of locations of television activity in Wales. The company ran a daily magazine programme which offered a range of research and trainee posts for young people joining the industry for the first time.

By the mid-nineties, a younger group of producers were establishing themselves as independent companies. Some of them had entered the industry as trainees (with companies or with Cyfle, the training programme financed by TAC and S4C) and had never worked within the older broadcasting production houses. Quite often, they were responsible for youth programming or for more alternative viewing; some only lasted as long as a single commission and others survived. One notable young animation company, Aargh, went on to develop the cave dwelling animation family Gogs and sold animation successfully overseas.

The fourth phase begins in 1997 with S4C's desire to reduce the number of clients with which it negotiated and the number of times that negotiation took place in any one year. Companies – often a cluster of companies – were encouraged to negotiate for a "bundle " of programming which would keep them in work over a two year period. This reduced the number of producers dealing with S4C in any one year from a quoted figure of over eighty companies in some years to 39 in 1997 (34 + ongoing long contracts from 1996). Concurrently, because work was given to companies for a two year period, the number of contracts entered into were substantially reduced. In the past, contracts were negotiated not by company but by production and in some years the number of contracts negotiated could be as high as 200 productions. The new method of working should give security and reduce costs. On the other hand, it also deprives unsuccessful companies of access to production work for a longer period of time. It is too early yet to assess the effect this will have on production companies in the longer term; some may well cease production while others will find new opportunities in the BBC, HTV, Channel 4 or even within clusters of existing independents.

Answers to our questionnaires on the reason for establishing the company reflect the fact that many of the earlier companies were set up when professional broadcasters working for the BBC or HTV turned themselves into independent companies. Because S4C is a publishing company and not a production house, it offered for the first time the chance for some programme makers to develop their own companies. One of the early companies, Ffilmiau'r Nant, now known on screen as Nant, had been established prior to 1982 and was commissioned by the Welsh Film Board to produce feature films. After 1982, Nant became a television production company and was joined by many new companies offering a range of documentaries, situation comedies, drama and light entertainment.

Of those who responded, 65% listed "Experience of the sector " as the main reason for establishing the company.6% had entered through training programmes and 18% cited personal relationships or friendships as another factor in belonging to an independent company. This reflects the fact that some companies may well have two professionals, husband and wife or partners, who have control of the company. Often these professionals may have already worked with the major broadcasters before establishing the company.

Other reasons for establishing the company emphasised the freedom and control which independent production had offered. Reasons such as " a desire to control my own production environment" and " a wish to work in a particular area not open to me within the broadcasting companies" were cited. Two companies also cited the fact that they had a desire to see Welsh language television flourish and to contribute to it.

Of those who responded, only 12% had received any grant aid in their establishment. Others depended on the system of commissioning, which paid for their programmes in full.

3. EMPLOYMETN

Of the companies who responded 59% operated at a reasonably stable staffing level for their core personnel; 41% operated with very few permanent staff but bought in additional expertise according to requirements. All the companies seemed to regard the producer or/and director as the core personnel to whom others could be added as necessary. This was especially true in the world of film where the director was seen as the key person within the company.

The Welsh Media Survey 1994 calculated that there are between 2,350 and 2,600 people employed on a permanent or freelance basis within television production businesses in Wales. The Survey also showed that working for one's own company or setting one's own objectives was especially appealing to women workers and that the sector had a high number of women in production and administration. It also noted that 66% of the sector had a degree or a diploma.

A survey of 17 companies who had answered our questionnaire and who employed staff in addition to the key director or writer, showed a remarkable balance of male and female personnel. One notices also that the staffing levels have remained constant over a three-year period. This reflects the pattern already referred to in Section 3 where companies tend to have a stable core staff and where others are bought in as necessary and/or where the facilities houses will provide equipment and technical staff on a production.

YEAR	94	95	96
WOMEN	34	35	34
MEN	32	33	32
TOTAL	66	68	66

The main areas of employment for all companies were as follows:

- Producer *(by far the most important category of employment for most companies)*
- Director *(most important category for film)*
- Researchers
- Office Managers
- Production Assistants
- Secretaries
- Finance Personnel
- Technicians

Those companies who specialised in Television Drama including popular genres listed Scriptwriters as key personnel.

Most companies placed their greatest emphasis when employing staff on experience and qualifications for the post. When employing presenters, actors or entertainers, all categories of our table came into play i.e. age, gender, experience etc. The following table shows the categories which television companies listed as important to them when employing staff. The numbers refer to the number of companies who referred to this particular category in the questionnaires.

When we look at the category of apprentices or training, the majority of the companies did not offer a training programme. Instead 71% referred to their co-operation with Cyfle, a training organisation set up by TAC and S4C to offer a full training programme in various areas of television production e.g. scriptwriting; research; camerawork. This reflects the way in which independent television companies in Wales grouped in the early years to maintain a common association, a common training programme and to loan equipment from facilities such as Barcud, thus enabling all companies to start up with very little equipment and very little capital funding. All these companies referred to Cyfle as their training policy. 21% said that they had no particular policy on training. On further questioning, most of these companies co-operated with Cyfle and were willing to take their trainees when they searched for new employees. Two more substantial companies had developed their own training programmes and had a person responsible for training and development within the company.

4. AUDIO-VISUAL PRODUCTION

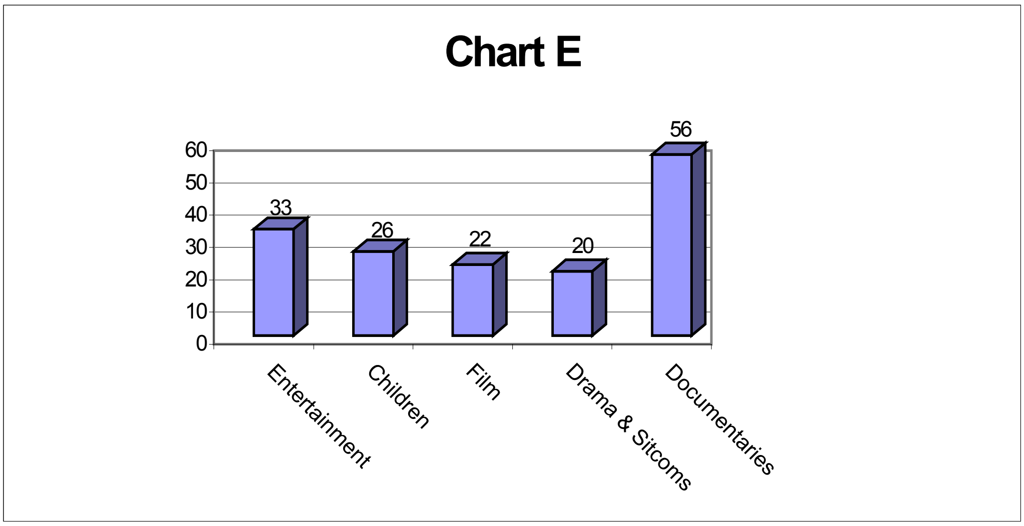
Television – All Companies	100%
Cinema	24%
Corporate Videos etc.	18%

All the independent production companies worked in the field of television production.

24% of those who responded cited cinema work but only in so far as television film can also be categorised as feature film. None of the companies who responded worked in film independently of television work. It is interesting to note that there is a general trend throughout Britain for television (in particular Channel 4) to support the emerging film renaissance and Wales is no exception. S4C has committed itself to at least one major cinema release each year in addition to its television film. HTV has also announced, since its takeover by United News and Media, that it will produce at least one major film a year.

Video making was another source of income for 18% of those who responded. Companies such as Cambrensis and Agenda for example produce staff training videos to industry or the public services. Most of the 18% produced corporate videos or information and marketing packs.

The 101 members who belong to TAC define their main interests in programming in the following way: (Some companies have offered more than one category of interest so that the total of companies in categories exceeds 101).



In addition some more specialist companies cited religious programming and classical music.

During the year 1997 (an average year), S4C broadcast 7,665 hours (7,169) in 1996, representing an average per week of 147.4 hours. This figure includes the programmes broadcast from Channel 4. The figure for Welsh language programmes for 1997 was a total of 1,773 hours (1996 – 1,677 hours) bringing the weekly average to 34.1 hours a week (32.3) in 1996.

Welsh language television programmes on S4C therefore amount to an average of 1,600 hours of television production per year. Of these, at least 10 hours a week , a minimum of 520 hours come from the BBC free of charge as has been explained in the contextual information. The Welsh language programmes supplied by the BBC were provided under Section 58(1) of the Broadcasting Act 1990 and were funded out of the BBC's licence revenue. This leaves an average figure of 1,100 hours per year to be commissioned i.e. about 20 hours a week. This figure will increase when digital technology allows S4C to broadcast twelve hours a day instead of its present three to four hours daily.

In 1996, 1,081 hours of Welsh language programmes were transmitted during the period 6.30 to 10.00pm. One of the requirements of the Broadcasting Act was that S4C should be able to compete for viewers in the most popular part of the evening thus giving a status and a sense of normal viewing to Welsh language programming.

	1997		1996	
	Hours	**Average Cost per Hour £**	**Hours**	**Average Cost per Hour £**
Drama	67	195,402	85	185,181
News & Current Affairs	284	36,266	287	37,121
Light Entertainment	189	52,166	168	66,035
Youth & Children	151	51,031	169	50,799
Music & Arts	82	58,488	76	69,738
Education	14	54,760	16	55,461
Sport	144	33,122	70	27,649
Religion	31	73,421	34	95,869
Total	**962**		**905**	

The cost per hour of commissioned programmes in 1997 was £55,639; the cost per hour in 1996 was £63,490. In terms of the independent production companies, these figures per hour could vary immensely from programming at £20,000 an hour or less to figures in excess of £900,000 for a film. Even when companies enter the sphere of large budgets, this may be one commission for one film, which could take over a year in development. 50% of those interviewed had a turnover of under £500,000 per year on all their programming activities. Again this might change as companies cluster for long strands of commissioning. The picture after 1997 may well be very different as commissioning enters a period of volume commissioning per company as opposed to programme commissioning.

S4C Commissioned Programme Expenditure 1992-97 (in £s) (Additional money was spent on repeats and bought programming)					
1992	**1993**	**1994**	**1995**	**1996**	**1997**
37m	40m	46m	47m	54m	55m

(Source, S4C)

Most production companies own very few rights to their products. Some larger companies have retained partial rights. Lluniau Lliw retain broadcasting rights for some productions. Cwmni 10 who have a contract to televise the rugby own broadcasting rights . However, these rights are won by larger scale companies and are not a general rule.

Some critics have queried whether the Welsh independent sector is truly independent in that the product is commissioned and paid for at full cost. The independent producer has little incentive to raise capital and to participate industrially in his or her product. S4C has a central marketing unit, which helps to publicise programmes, strands and individuals as well as corporate branding. S4C International sells programmes overseas, in particular in the industrial fairs at Cannes. The independent producer can enjoy full recognition for his or her work through international awards and through international sales organised and fought for by S4C. On the other hand, the independent producer has no real stake in the long term future of the company. Programme making without rights does not allow companies to build up a sellable future.

Despite this, the success of S4C in selling abroad cannot be denied and much of that success has been through the successful branding of one product rather than a divided and fragmented image of the industry. The Animated Tales of Shakespeare have sold to over 60 countries. A Welsh-language film, Hedd Wyn, was nominated for an Oscar and in 1998 Joanna Quinn, an animator, was also nominated in the Short Animation Film Category. Such activity has to be co-ordinated and used for the greater good of the industry as a whole. S4C has been particularly active in the Royal Television Society awards but Welsh Television has also devised its own BAFTA evening, its own Celtic Film and Television Festival, the Cardiff Festival of Animation and the Welsh International Film Festival. Most companies were proud of these awards. Teliesin for example had won 15 prizes in the decade between 1986 and 1996.

The public service income of S4C relates to the remit set out in Sections 56 and 57 of the Broadcasting Act 1990.

Other income is generated from commercial and other non public service activities set out under Section 84 of the Broadcasting Act 1996. In 1997 other income accounted for £10,075,000. As stated above, this other income is generated from sales to sixty countries.

Public Service Fund income and Sales income *(72,223 for example is £72 million).*

	31/12/97	31/12/96
Public Service Fund	72,223	68,416
Sales Income	10,678	10,928

	31/12/97	31/12/96
United Kingdom	9,466	9,778
Europe (without UK)	742	555
United States of America	138	283
Rest of the World	332	312
Total in £ million.	**10,678**	**10,928**

CONCLUSIONS

Factors which are common to all the companies in wales

- Most companies made use of facilities houses or post-production facilities e.g. Barcud/Derwen, Soundworks and Enfys. For example, very few companies invested heavily in editing suites preferring to pay for time to a facilities/post-production unit. This reflects the nature of the companies with their low capital starting base. It also reflects the strength of the facilities/post production sect or and in particular the strength of some individual, e.g. editors who are hired constantly. The bigger facilities have outside broadcast mobile units and scanners to transmit live events, equipment which is beyond the reach of individual small companies. By now, the major facilities gain work not only in Wales but throughout Britain and wish to see a volume increase in work outside Wales.

- Most companies had a core number of key personnel. Often this core was small, ranging from 3-10 people, complemented by bought-in staff for individual commissions. However longer strands (such as a daily magazine programme done by Agenda Television) required much higher staffing levels. Such a company an average of a 125 people and does its own training.

- Most companies had lost staff over the years. In the main staff had gone off to establish their own company or had joined rival groupings. There was a fairly even division within the industry between those companies, which had remained constant, defined by well-known individuals, and companies which fluctuated, split and re-grouped. On the whole the sector seemed reasonably stable and capable of creative change.

- Many companies were very ambitious, keen to work for the BBC, HTV, C4 as well as for S4C. Some of this wider ambition has come about because of a decrease in profit margins from S4C; on the other hand, some companies (e.g. Lluniau Lliw) have always been ambitious to co-produce with other countries and to sell their work e.g. Lluniau Lliw have recently co-produced a four-part drama series with Polish Television on the life of a British prisoner of war in Poland. In addition, C4 has had a change of remit so that 30% of its work has to be from the regions of Britain. This has also meant an increase in C4's approaches to independent producers in Wales. The new digital era with its multi-channel future will mean that there will be many more opportunities to sell to new channels. On the other hand, the cost of such programming will be lower than has been the case historically for established terrestrial channels.

- Despite their ambitions, most of the output of the smaller companies is promoted on air by S4C and sold by S4C in overseas markets. Few of the companies owe substantial rights since they are paid in full for each commission. In addition, few of the companied seemed keen to take advantage of any grants or schemes available to them from Europe for example. Some complained that the low level of acceptance into the Media programmes did not make it economically worthwhile for them to devote a great deal of energy in devising new applications. On the other hand, there was an acceptance of the worth of some scripting programmes.

- Most companies relied on the training scheme, Cyfle, to which they contributed. The exceptions had training programmes of their own but this was not commonplace.

- There was considerable praise for TAC. Many companies found the association helpful in dealing with or offering explanations in particular matters. Some companies praised the organisation for trying to be pro-active in gaining new work. Most of the interviews referred to PACT, and in particular to TAC as useful and helpful organisations.

- Most companies had not had to borrow from the bank for start up capital since the system of commissions and the facilities houses (see above) obviated such a move. Most companies felt that they were still expanding in terms of staff and in terms of funding new premises. However, whilst the initial capitalisation was not a problem, cashflow continued to be a problem for most companies. In particular research and development of new ideas suffered from lack of funding.

- Some companies said they found it difficult to find new artistes/directors of quality. Companies were aware of the change of re-using familiar faces; they were also aware of trying to reach as wide an audience as possible.

- The 'bundling' system came in for a good deal of criticism. The criticisms were twofold: 1) stability was being offered in return for lower prices thus casting doubts on the quality of programmes; 2)creativity and flexibility could be eroded. These are fair points, which have to be challenged and understood. On the other hand, the administrative chaos of trying to deal with many small companies who had no long-term strategy towards the channel was equally destructive of longer-term aims.

- There is obviously an opportunity in Wales at this current time to look towards Europe for support for minority language programming but there is also a need to carry a wider indigenous spread of the population into S4C programming.

CONCLUSIONS

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Our investigations have encountered some limitations in that most companies in the sector seldom show any systematic elements surrounding their overall activity, however different these may be, and that there is a tendency not to disclose information about the financial aspects that define the sector nor about the nature of specific contents. Other aspects that need to be urgently addressed are the excessive dependency on subsidies and public institutions, as well as low levels of professionalism, especially in the field of promotion, co-production and marketing in general. Therefore it is our intention to contribute towards a better understanding of the situation and progress in the sector, by means of establishing a Monitoring Centre for the Audio-visual during the biennial periods of 1997/98 and 1999/2000.

The hypothesis that came to be confirmed are such that link the development of the sector in the lesser used languages, or languages of nations without a state -the case for Galician- to the existence of public Televisions whose identity policies are defined minimally -the Welsh case-, based on historic and cultural references as well as those defined by expression.

Another core aspect, the extent of involvement in the international market through competition and how it is understood, make us aware of the need to change certain traditional paradigms and to start thinking of competition not as a struggle between similar products at the same time and place, but as issuing from communicative flows to recover any product at any time and in any context. So in order that there be interest when selecting a product, it is necessary that its existence be made known, and also that the difference be perceived as compared to other products. To build upon the brand image for each sector thus becomes one of the foundations on which the presence of products constructed in Breton, Welsh or Galician shall add to the richness of Europe's cultural industry.

In this sense, from a European perspective, audio-visual productions issuing from different cultures become assets that may benefit from the changes brought about by technological convergence and new forms of competition.

Therefore, neither the issues should be antagonistic that surround identity and markets, especially in terms of thematic niches, nor should the inter-cultural processes of creation and realisation of new products starting from the contacts between different realities that are those of the sector in Brittany, Galicia and Wales be so.

In spite of certain analogies at cultural and political levels, and especially in what refers to goals, a series of warnings are called for before reading into these conclusions. First, there is the difference in timing for the progress from a monopolistic state-type television system towards a mixed, commercial system, that took place in Brittany and Galicia less than a decade ago, as opposed to the four decades of experience in the Anglo-Saxon space, where ITV has been there and regional. Together with the public broadcaster BBC, the private boradcaster ITV has contributed, and continues to do so, by supplying programming in Welsh language to S4C.

Secondly, there are differences as to the development in the discussions about identity and the relevant commitment on behalf of the professional culture in the sector, even when they relate to the lines of programming in public television. This is because in general broadcasters have not yet fully assumed their role as constructors of visions and versions that are collective, since it is easier to accept the political role for the language albeit forsaking the political role of the discourse, i.e., the content itself; and to reach awareness of the historical, cultural and social factors that take part in the interpretation and reception of said contents.

Let us, for instance, consider the case for Galicia. Although the public television broadcaster was established by Parliamentary mandate in 1985, the identity question is of recent appearance, since the philosophy in its first ten years of existence was closer to that of minimal, proximity television rather than that of public television as an essential medium in the process of constructing a nation's identity in direct relation to other aspects of social life. One such aspect being the market, and from the market, relating to methods of production and dissemination of certain assets of symbolic nature. Assets that face the challenge of competitiveness and the obligation to add on to real pluralism as demanded by the true manifestations of global exchange.

It is accepted nowadays that diversity is not brought to the sources of programming that European citizens might enjoy by simply creating new channels or new means of distribution, stated Bob Collins as assistant director to Radio Telefis Eireann during the 8th European Television and Film Forum, held in Amsterdam in 1996. In the meantime, the political orientation was being revisited that had left broadcasting exclusively to market forces, whereupon it was concluded that the key element in order to achieve understanding was that audiences should be viewed as a part of communities and not just as mere consumers. Audiences should be seen as living elements, in spite of being called "users", as they resist forsaking participation in their own history.

Such a key element requires, however, decision-making. This is lacking in the Breton case, where there are no competencies in mass media and thus no autonomous public television. The variant of de-centralised television is not representative of other contemporary modes of territorial broadcasting, that we do nevertheless find in the cases of Galicia and Wales, as integrating the cultural industry. The legal framework, in the case of Galicia, is the Statute of Galicia and for S4C the subsequent Broadcasting Acts. In both cases there are proper agencies for management and control and so they are in a position to overcome the false prejudice of the languages as being a hindrance to dissemination in a global market. This puts them in a position to place audio-visual productions into the communication flows by means of trans-regional strategies and of projects, in the short term, for cataloguing, dubbing, subtitling, and especially, co-producing. As regards profitability, only S4C mentions in its annual reports any increase of sales since 1995, and right now TVG is undertaking to exploit its archives for thematic offers.

Public television is, in the three cases studied, the driving force for audio-visual production. Nevertheless, the tradition is in each case a different one, both in quantitative terms -amount of product, jobs and business volume- and in the circulation and nature of such products. Thus, grossly speaking, fiction is the dominant genre for Wales, where most of S4C's investment during 1996 went into Drama; informative pieces, including news, prevail in Brittany; and in all cases documentaries are also feeding the sector. Feature films and animation are the products most likely to achieve projection in other markets, in all three cases.

In Galicia, the offer in documentaries and fiction for television is quite balanced. Recent announcements that TVG is to support film-making with an expected investment amounting to one billion pesetas along the next three years refer us directly to the Welsh model as the immediate priority for the field of production: remember the nomination to an Academy Award for best foreign language film in 1994 given to Hedd Wyn, and to the animated film Famous Fred in 1998.

In the Breton case, as there is practically no production in Breton language, the timing is crucial in order that proper plans be drafted to bring life into the sector and overcome the mere ethnographic effect, and so start aiming at specific audiences, such as young urban people, where the number of speakers of the language is known to be increasing. This all leads us to believe that future actions shall depend ever more on nationalitarian policies, such as those that define the Galician and Welsh cases, than on the endogenous capacity of the sector in itself. It is difficult, though, to establish comparisons amongst the degree of visibility that any such productions may enjoy abroad. The Breton and Galician cases are similar, having sold around 10 hours in the last three years. The Welsh case, however, stands out both as regards co-production schemes -with French (La cinquieme), Irish (RTE), Canadian and American companies, and through the network that sells in over fifty countries on different support media. An indicator of this is the fact that the children's series Super Ted became the first European animation to be broadcast by the Disney Cable Channel.

Besides the differences in business culture of the public broadcasters that served as a model, influencing for the better in the case of BBC over S4C, and negatively in the case of TVG's protective TVE-based model, the Welsh case is the best in order to locate the emergence of an audio-visual industry around the origin of S4C itself. It is defined as a broadcaster, and the contents arrive there in Welsh language but supplied, not only for news, reportage and magazine shows, but for the star series -Pobol and Cwyn- by the BBC itself as well as by HTV and other independent companies that arose due to the emerging demands of the Welsh channel. In its turn, should TVG have not been designed as a protector, not only broadcaster company, it may never have come to exist, as the sector was lacking that was required beforehand as a support, and also due to the fact that the public television at state level was not willing to co-operate except through legal imposition in producing programmes in Galician language. Since the separation of public and private media are something very recent in both Spain and France, it has only been in the last few years that the relevant sector and its relation to the broadcasters have achieved sufficient significance in order to become the object of a study such as this one.

It is also noteworthy that is has been during the last five years, especially since 1995, that the audio-visual sector has grown at all in Galicia, Brittany and Wales, a process parallel to that of European policy in general. During this period companies are starting to specialise, and it is also when professional associations are established (ABAP, AGAPI, TAC). These associations carry out some sort of lobbying before the cultural and administrative instances, inside and out of their relevant territories, and undertake negotiations with the broadcasters. Moreover, they are the meeting points for information that is of interest to producers, and they generally devote much action to training and qualification, to overcome major problems as well as to assist their associates in business matters. The degree of involvement in training differs in each of the three cases, and it provides us at the Universities of Haute Bretagne -Rennes 2, Santiago and Wales with interesting data in order to deepen, from an academic standpoint, into curricular and research actions directed towards meeting the relevant demands. These are the design, production, dissemination and policy-making in promotion, that are the weak spots in the Galician as well as Welsh cases.

One thing is clear for the three cases, and that is that any future impulse or even possible extinction, shall derive from whatever knowledge is achieved of the complexity in the lines that are to be drawn for the progress of communication, on the one hand, and on making the most of the measures being implemented in European policy on the other, in order to drive the production in smaller countries, and, as an unalienable right, the production in their own languages, to a greater or lesser extent. To this respect, and because in any case concern for multimedia is a core issue both for broadcasters and producers, we call attention towards the recommendations under the final report " Building a European Information Society for everyone", of the Group of Top Level Experts at the European Commission/ Directorate General for employment, industrial relations and social affairs, drafted in April 1997, from which we quote out of **11b) Feeding the multi-cultural Europe**:

"The use of technologies for information and communication may maintain a multi-cultural vision in Europe inside the information society -considered to be a focus of cultural development and transmission of ideas and facts proper to civilisation, promoting direct contacts between different groups (in general dispersed) and of support to multi-lingualism in European society. Co-operation shall be positive with similar programmes outside the borders of Europe, as well as by co-ordinating actions with international organisations that play a role in this domain".

The digital challenge: national, independent commercial identity as an inter-cultural asset.

The language and the national imagery as a value towards change, a growing audio-visual sector, community directives favouring digital compression and expanding inter-cultural relations... all point towards the Welsh case as the one where the awareness soon developed of Identity as a part of a commercial asset, both in the domestic market -development of corporate image campaigns in other television channels, qualitative studies around receptiveness, etc. as well as abroad. This idea of Identity shall deepen as a mark to confront its plans with the digital age.

Likewise, the reinforcement of the consideration of Identity as an element for promotion also emerges in TVG's lines of action, that shall also become an element requiring Galicianisation of the sector, as we may come to confirm in future analysis.

The awareness as to the changes that shall be brought by digitalisation and technological convergence for communication and competitiveness at the international market are manifest through producers opting towards multimedia, but more so through the actions of public televisions such as TVG or S4C, whose specific plans to be present at the digital arena are expressed in the words of Prys Edwards and Huw Jones, President and Executive Director of S4C: "for the first time ever the Welsh language has been given parity with English at the start of a technological revolution".

TVG's signal is transmitted throughout the territory of Spain via satellite (Via Digital) and cable (CTC, Cable i Televisi¢ de Catalunya), or to territories that are close geographically (Asturias), or culturally (Portugal), as well as to Latin America, a continent where there are many emigrants, both due to economic as well as ideological reasons (the latter after the civil war in 1936). This is done through cable in Argentina and Venezuela, satellite in Mexico and using both systems in Uruguay. All this indicates that the Galician language also enjoys another means of circulation. From this starting point, it shall have to face new requirements, further to those of a linguistic nature, to identify the contents and their quality, the same way that S4C intends to pursue this year, 1998, when it shall start to offer programming through Multiplex 3, including 30 minutes daily for Scotland in Gaelic language, and SDN, S4C Digital network Ltd; and via satellite to broadcast across Europe. Subtitling policies are envisaged to allow viewers in other countries to incorporate Welsh products into their everyday lives, given the good results obtained at home using the standard marketing formulae, reinforced since 1995 in the same manner that the language is being revitalised domestically.

"The task now is to define the nature of the services which S4C might offer to viewers and to create for ourselves a unique identity in a multi-channel age"

RECOMMENDATIONS

- To enter the multi-channel age from a multi-cultural philosophy, ensuring coverage of spaces and defining the identity of products as advertisement and also as a means to reach equal participation, free of discrimination, whatever the volume turned over by the sector.

- To design policies for subtitling lesser used languages, by offering them on equal terms to versions in other major languages, as well as dubbing policies for each language together with research projects that may detect market niches and variety in a universe of reception: user features and cultures; starting at the countries in the Atlantic Arc to follow by potentiating the corporate image of public televisions in each country.

- To discuss the role of the Authorities in the media, their duties towards the business and the public interest in the next fifteen years of transition from the old analogue towards the new digital sets, which discussions shall be of special interest to public broadcasters in small countries, as these are televisions that become a guarantee for the existence or even survival (the case for Breton) of original and pluralistic supply, both by reasons of costs and of political and cultural goals.

- To expand on the traditional categories that define quality, in order to include therein Identity, attaching to it the sense of democratic and anti-xenophobic values in learning about difference, otherness as inter-cultural values and implementation of difference with the basic tools of indexing, marketing and copyrighting.

- To attract, after all, the unavoidable political and commercial logic of the cultures towards the logic of telecommunications, forsaking the delusion of similarity and recognising ourselves, to quote the words of Dominique Wolton, in a mutual acceptance of radical differences that make up the European space, but in order to make it profitable as it becomes visible.

Santiago de Compostela, April 1998