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We are striving to make further
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implement them in the next few
months.

Patrick Jaquin
Editor-in-Chief

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History

Boris Bergant

Deputy Director General for International Relations, RTVSLO; Vice-President, EBU

We are on the eve of a historic achievement in European history.

With the referendums in the respective candidate countries and the approval process in the member countries' parliaments, we are facing an expansion of the European Union with the potential entry of 10 new countries. It will represent the biggest single enlargement of the EU. A truly historic moment for Europe.

For the first time in European history the continent is uniting peacefully, without threats, wars or aggression and with the aim of establishing stability, peace and prosperity. It is a truly historic moment for the EU. The peaceful uniting of France, Germany, the United Kingdom and other Western European countries represents a pivotal achievement that has overcome the traditional rivalry among these countries which has been the cause of many a war. Now that we are integrating Central and Eastern European countries with those from the West, a totally new dimension is opening.

The unified Europe of tomorrow will not be the same as the united Europe of yesterday. One cannot but ask oneself whether these two Europes are up to the challenge. I have the conviction that such a Europe will need more than accountants and lawyers or an exclusive elite of politicians and businessmen to run it. A new Europe that will endure needs to be a Europe of culture and cultures, striving for unity in the diversity of its cultures and languages, embracing a wealth of values both different and specific, and revealing its cultural creativity and not only its business talents. We haven't done enough in regard to this.

I am afraid that we may stagnate, we may even go backwards. For instance: after 10 or 12 years of transition has Western Europe really got to know Central and Eastern Europe, its cultures and creativity? Politicians and businessmen have...

eventually, the public certainly has not. It is an unfair and one-way process. In Central and Eastern Europe the public is by far better informed and enjoys much more Western European culture than is the case vice versa. I wonder whether money bears sole responsibility for this – is it a one-way financial trend or simply a sign of reluctance and lack of interest?

Whatever the reason, this needs to be changed otherwise in the long run we will create a united yet divided Europe: a two-speed Europe, which will eventually generate new animosity instead of bringing peace and stability. In economic terms, there will always be areas that are more advanced than others but in the cultural sphere, the field of information and public service media this is not desirable. In the media, particularly public service media, the process of transition in Central and Eastern Europe has been achieved. New legislation is being implemented nearly everywhere, most of which reflects Western European standards, i.e. following the directives of the EU and the conventions of the Council of Europe.

However, we should not try to generalize: as in Western countries,

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in motion



Central and Eastern European countries have their own particularities, and also cultural and historical traditions. Experience has shown that whenever legislators have blindly copied and transferred foreign models, they have eventually encountered problems and have had to correct errors. In many, too many cases, bureaucrats, self-proclaimed experts and messengers from the West have tried to impose new models on these emerging democracies. However, these models do not exist; they do not function in the West. These models are a result of wishful thinking and have caused a lot of unnecessary problems.

New legislation in Central and Eastern European countries is now in place, but by far it does not mean that everything works. Media legislation cannot be excluded from the general political and legal environment, nor should it be expected that a truly democratic environment can be established

overnight. Even in Western democracies it took decades and there were problems and even negative experiences. Currently, the biggest obstacle is that we lack an effective and unbiased (i.e. non-corrupt) system of control, an effective judiciary system which does not have a 4–5-year backlog of cases. It calls for a change of attitude by politicians. A democratically elected dictator is no better than one who is undemocratically elected or self-imposed. We will always face the threats and desires of politicians to control the press and media. The only answer and safeguard to this is a functioning civil society and a genuine transition from state to public service broadcasting. This is not an easy process as a public service broadcaster has to be politically and economically independent which is not the case in many Central and Eastern European countries. In a country without the licence fee tradition, the introduction of a fee will create many problems and will not be very

popular. Hardly a politician will dare to do so as he knows that the very next day he will be severely criticized by the journalists of the public service broadcaster in question. But if they do not criticize then they are failing to fulfil their duty. It's a vicious circle.

I am convinced that the biggest achievements of this transition period have been the development and improvement of programmes. Despite the scarce financing available for fiction programmes (this could radically change if costs were shared or if there was European-wide co-operation) and the dual system that saw the market shares of public broadcasters fall dramatically, the majority of broadcasters have managed to overcome the difficult challenges and have made considerable improvement in journalistic content. Today, journalists have no limitations. Press, radio and TV can withstand anything including, unfortunately, very bad journalistic research and extremely

poor quality journalism. The consequences of former autocratic editorial policies are found in structures that tend to be chaotic, where there is no authority or only a vague editorial policy – this is bad. In many instances, we are faced with too much or misunderstood democracy. But no laws will help here. There is an obvious need for self-regulation and the development of ethics, codes of conduct and professional standards, created on the prerequisite of a functioning civil society.

I would like to conclude by saying that public service broadcasting which is functional and politically independent has to be the prerequisite for the survival of a pluralist democracy everywhere, and especially in Central and Eastern Europe. However, the political independence of public service broadcasting is impossible without its economic and financial independence. Moreover, the survival of public service broadcasting is

impossible without the modernization of content and technology. New media should be at the heart of the public service broadcasting programme content offer. In many cases this is feasible because the size and resources in a given country means that programme content can only be developed through the public service. Public service broadcasting is thus functioning as the central independent content provider for society. Yet it will be impossible to secure and achieve this state if public service media is continually treated as a market activity, similar to commerce and industry.

Different stages of development in Europe, and also within the EU and the to-be-enlarged Europe, are still significant. The majority of Central and Eastern European public service broadcasters are unable to participate in big Western European coproductions and projects due to a lack of funds. They are not in a position to implement the technological and digital revolution

on their own. After ensuring more transparency and efficiency, we need to secure the survival of public service broadcasters by safeguarding their independence and development.

Public funds can only be obtained if there is a change of mind by those drafting EU rules and legislation and which should, in turn, provide for such public funds on the one hand and preserve the political independence of the public broadcasters on the other. Considering the aggressive interests of the private broadcasting industry it will not be an easy decision but, in my opinion, it is a necessary one. If politicians had the courage to start the process of European unification, they should also have the courage to introduce the necessary measures to defend democracy and the free media including public service broadcasting. Now is the time for it. The enlargement of the EU is without doubt a historic moment. But it is not the end of a process, rather the start of one.

Today, European television is faced with two objectives.

their profits by tending to minimize investment in production, public service operators must maximize the service provided to viewing 'citizens', assuring them a diversified offer of quality programmes thus fulfilling their public service mission.

The mixed television system of Western Europe is included in this way of thinking. The national and community public powers are presently involved in creating a political framework in consequence of this. However, this balance may be threatened by the introduction of digital television if the new rules are only established by the market. Politicians must arrange a legal and economic framework suited to the new digital environment.

Within the countries of Central and Eastern Europe, the legislative process of the last decade has given rise to a legal framework that

There are two complementary objectives: the enlargement of audiovisual Europe and the arrival of digital television. In this continually changing audiovisual framework, the presence of a strong public service television is a guarantee essential to the preservation of audiovisual pluralism and cultural diversity.

The increase in merger and acquisition operations between commercial operators threatens the plurality of operators in time. Faced with commercial operators who maximize

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encourages audiovisual media plurality, although the balance between public service and commercial television is still very frail:

- public television in these countries is still marked by almost 50 years of political monopoly;
- the reduced size of the national markets does not free enough resources to finance original, quality productions.

This institutional heritage that translates in a legitimacy deficit of public television and these economic limits that hardly attract national investors have facilitated the development of commercial television networks controlled by multinational and often North American groups in Eastern countries.

Transparency

Television that participates in the life of citizens does politics. Therefore it is better to free it of the will of political power without removing it from politics, at least assuring that there is an objective treatment of information. This transparency can be assured by regulatory authorities, the independence of which must be secured by legislators and the judiciary.

Financing

By ensuring there is sufficient and continuous financing, public service television operators will be able to offer the best to their viewers, especially in developing national and/or regional productions, possibly through international cooperation. Faced with the offer and audience fragmentation risks, international cooperation must also permit

European public service television to build federal offers that reflect the diversity of national identities. In the new audiovisual balance of the 'Great Europe' of the digital era, politicians must guarantee the media plurality and cultural diversity of programme offers. To this end it is essential, in this new digital scenario, to guarantee the diversified presence of public service television by all distribution means.

Communications, especially audiovisual, must be one of the pillars of construction of the future enlarged Europe.

political dimension

econ

Michèle Cotta, *President, Group AB*
Gaetano Stucchi, *Media Consultant, Eurovisioni*

What are the economic expectations of the audiovisual industry of the candidate countries?

The analysis of the economic situations of the audiovisual industries of the countries candidate to join the European Union gave rise to the following recommendations.

Given the frail and poor financial conditions of the production and distribution structures in these countries, it is absolutely essential to protect and strengthen the support systems that exist in the European Union at the regional, national and European levels; to extend its coverage and access to these new members; and create new and more efficient ones where there aren't any.

This goal could be pursued only through an enhancement of their current resources.

The other economic engine that must



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be strengthened and revived is the financial capacity of public service television. In all candidate countries it constitutes a main partner in national audiovisual production that can play an essential role in the relationship with various national publics and, therefore, in satisfying the demand to create identity on each national market.

However, the sector's regulatory framework must be uniform and coherent (for cinema and television and for public and private companies), especially regarding the terms of their production obligations (that needn't be identical but equivalent and proportioned) and contribution in supporting the national and European industry.

It will be necessary in time to establish complete and transparent circumstances for the audiovisual industry of each candidate country by the competent European and national organizations (the basic questionnaire used for this workshop can define the minimum level of the current situation in each country) to allow potential investors as well as national, European and international regulators (from venture capitalists to banks, from the European Union to the national authorities) to make their decisions in full knowledge of the facts.

Audiovisual market

The specific situation of the audiovisual market of each candidate country must be taken into consideration both in terms of the most appropriate steps to the economic support of the national industry and of the political field as well as, lastly, the regulation and competition fields (tax shelters, antitrust laws . . .).

The European model of the 'mixed system' (public-private) in the organization of the audiovisual sector must be adapted and modified according to the needs and risks tied to the particular situation and economic climate of each candidate country, using as a reference a serious and analytical balance sheet of the results and limits arising from this system over the last 20 years of experience in the European Union member countries.

It is a priority to encourage, by all possible means, the access to audiovisual products and works of the patrimony of the candidate countries to the Union's outlets using all distribution forms (cinema screens, TV, online, new media . . .) and vice versa, in order to accelerate the integration of the audiovisual industries of the candidate countries

within the Single Market, and counter these processes to the very determined penetration of the American industry on their national markets.

The best possible comprehension by the professionals and entrepreneurs of the entire enlarged Union of the different national economic regulation panoramas (objectives, resources, devices . . .) must be promoted and encouraged so as to facilitate their spirit of initiative across the European territory, as a first step towards the future harmonization of regulations. In particular this goal could be pursued by the MEDIA desks network and by the existing training initiatives of the MEDIA programme.

Finally, a realistic view and solid principle of graduation must inspire the expectations and decisions of the candidate countries in relation to their technological investments linked to digital development (either terrestrial, satellite or in cinematographic applications, etc.).

The

legal dimension

Karol Jakubowicz, *Head of Strategic Planning, TVP*
Michel Fansten, *Representative of the Ministry for Culture, France*

Enlargement: grounds for enthusiasm or worry?

Confronting the problem of enlargement means, above all, answering three questions:

- How does the awareness of the *acquis communautaire* in terms of audiovisual regulations present itself today in the legislation of candidate countries?
- What are the problems that exist, in particular, for the reconciliation of the obligations set by the OCDE or WTO, and those of the European Union?
- How will these new partners be linked to the revision of the TV Without Frontiers Directive and, more generally, to the establishment of new directives to regulate current technical developments?

On the first question: all the candidate countries have already introduced most of the European rules in their legislations to the point where almost all of them are already, or are about to be, associated with the MEDIA programme.

To give an idea of the progress made, Krzysztof Wojciechowski (TVP) remarked that all of these countries had come a long way. But even before joining the European audiovisual project the re-establishment of democratic conditions was not only their primary objective, there was also the importance of awakening the actual need for democracy in their citizens. It is in this sense that new meaning has to be given to words such as 'pluralism' or to the relationship between audiovisual media and political power.

In most Central and Western European countries, the *acquis communautaire* did not begin with the project to join the EU. It is the accomplishment of a process that began at a national level with the preparation of the first regulatory texts regarding media, in particular with efforts aimed at building a democratic and pluralist television, and affirming the principle of free circulation of programmes.

This process started in the framework of the Council of Europe

and through the exchange and coproduction of programmes developed by the EBU.

Some nuances

Today, the European principles on the subject of media diversity, pluralism and independence have been totally included in national laws.

The same can be said, with some nuances, for the adoption of the EU TV Without Frontiers Directive that regulates advertising, tele-shopping, or in another context, the protection of minors or the transmission in clear of highly important national events.

There are two points where the alignment with European Union practices has seemed more complicated: regulation of author protection and remuneration, and especially the question regarding the place for national and European programmes in the production and programming policies of TV broadcasters.

Legislation in most of the candidate countries has actually been faced with two problems:

- reticence in replacing national quotas with European quotas, amplified in numerous countries

by the weakness of their internal markets;

- the pressure of the United States, exercised through organizations such as the OCDE and the WTO, for not limiting the freedom to invest and trade in the audiovisual sector.

The weakness of the internal markets of each of the candidate countries implies that national audiovisual creation must be supported by a strong public sector.

The same applies to the question of the pressure exercised by the WTO. Many candidate countries originally adopted legislation that opened their audiovisual market to the free commercial access of investments and foreign programmes, contrary to the principle laid down by the European Union. This caused serious problems at the start of the process to join the EU. Most countries have been able to review their legislation with the help of the European Commission, however, difficulties still exist. Hungary, for example, which was one of the first countries to move towards economic

liberalization, had already undertaken a certain number of commercial obligations such as, in its first regulation, the rule that the transmission of foreign television channels originating from its territory was not under the authority of national audiovisual regulations but that of telecommunications.

Today, the most sensitive subject is the definition of national production. There are two schools of thought: a business logic that favours a wider definition, i.e. all the production made in the country in question or with the country's means; and a cultural logic which is much more restrictive but more similar to that adopted by the European Commission and uses a linguistic definition of national production, i.e. only the production made in the language of the country in question is national.

The Commission considers that the development of a national programmes industry is closely tied to national support policies, but these policies must be compatible with the construction of the European audiovisual area.

Review, revise

The last question refers to the review and revision of the TV Without Frontiers Directive. The workshop participants, after having read article by article the text of the Directive and after an extremely open exchange of views on the amendments to be applied to the current text, were unanimous in recognizing the fact that if new member countries are to apply the texts they must be included in their revision. The more they are associated with the current revision work, the more the legitimacy of the European legislation strengthens.

Is the enlargement of an audiovisual Europe grounds for enthusiasm or worry? According to lawyers, the question should not be put in these terms. The prospect of leaving the audiovisual markets of Central and Eastern Europe on the outskirts of the European market is not beneficial. Above all, it is not helpful to the current member countries of the European Union because the development of satellites means that the Television Without Frontiers Directive has already become a reality that cannot be ignored.



Conse

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Conserving films, collecting them and making them accessible: an old idea that's still relevant.



The idea of systematically conserving films, collecting them and making them accessible to the general public was born practically at the same time as cinema itself, that is to say some time after 1896.

The father of the project, a Pole from Paris called Boreslaw Matuszewski, saw it as a public duty comparable to public libraries and museums. At that time films were obviously not considered as an art. The first idea was therefore to collect examples, hard-copy memoirs, of film-making.

This reminder is not impertinent at the dawn of the third millennium, when several Central and Eastern European countries are preparing to join the European Union, bringing with them a cinematic and broadcasting heritage of enormous value.

Only a true, fair collaboration between the two Europes can achieve the aim of conserving our European film heritage and providing greater and better screening opportunities. This collaboration should, however, meet the following requirements:

- The systematic collection of films by ensuring that structures are introduced in all Member States

Surviving

our heritage

to legally register productions combined with an efficient voluntary system to include audiovisual archives in this process.

- High-level research projects to improve long-term conservation conditions and restoration using both analogue and digital systems and setting up a structured training programme that includes the use of digital technology for archives.
- More information on the resources actually available and their state of repair, in order to create a network of existing and future databases for European cinema heritage.
- Coordinate legal measures to enable the above points to be implemented and speeded up to result in a wide-scale distribution of European films adapted to the latest sound and picture broadcasting systems.

On account of their artistic and historical importance, audiovisual pictures are an integral part of any discussion on how to preserve European heritage. Even if they are part of any vision of heritage conservation, audiovisual archives

have a particularly long head start, in the form of the definition of meta-data, the common language that could enable all European archives to 'talk to each other' regardless of language and indexing systems used. The Pi-meta project carried out by the EBU with the active support of members such as the BBC, the INA and RAI could be a major part of this.

Throughout Western and Eastern Europe film libraries have for many years been doing an extraordinary job under sometimes difficult circumstances. But besides the support of all professions connected in one way or another to the film world that work to keep it alive and develop it further, it is high time we decided how we should preserve and distribute our film heritage. When does a film become part of our heritage? How can we make access to this heritage as democratic as possible? And how do we involve the film-makers in this eternal life beyond the often short commercial life of their work?

All these questions bring us to a much broader question: will the Europe of tomorrow, comprising 25 countries, still be able to do without an active policy to protect its cultural heritage? Without a European-wide

scheme to finance at least the networking of our knowledge and the heritages of the richer countries with those in poorer countries, the wealth of knowledge in minority languages with that in major languages, Europe is likely to cut itself off from a large part of its past and consequently also impoverish its future.

Countries in Eastern and Central Europe can contribute to this work. Their contribution cannot only be measured in terms of increased numbers of films archived; it is an enrichment at all levels. Especially because valuable collaboration was built up between East and West, even during the politically difficult years, by associations of film libraries and audiovisual archives. History teaches us that much of Europe's collective memory, even that belonging to Western Europe, is to be found in the East.

Preserving its heritage must be a priority for Europe.

And yet, if this heritage is not made widely known among the younger generations, preservation has no sense. The memory of European film-making can only be perpetuated if the archive material is publicized as broadly as possible: in cinemas, festivals, on television, video, DVD and the Internet.

New ways of broadcasting European cinema heritage are provided by the development of new media, but real obstacles sometimes stand in the way of ideal circulation.

While they are intended to protect the creators, some clauses of copyright law and their application by the rightsholders can, paradoxically, result in works being taken out of circulation. It would not of course be appropriate to question the legitimacy of a law that protects those who are the true film-makers through their creative talent and their financial investments. However, we must recognize that if we can now start planning to broadly publicize

European heritage films it is largely thanks to the work carried out over the past half-century by the film libraries and archives in spite of legislative barriers.

Considerable public investment (estimated to total a billion euros) has been granted by the Member States to the conservation and restoration of films. But it must be underlined that no rights – even cultural and strictly controlled – have been granted to film libraries in exchange for this enormous work:

- Ownership of materials produced with the aim of restoring film is denied to the film libraries although they alone have financed them, and no remuneration is foreseen when these restored films are exploited.
- Any publicizing of the works involved, even for strictly cultural and pedagogical reasons, is

formally prohibited without the agreement of the rightsholders, in the majority of European countries. The fact that the notion of non-commercial rights has disappeared from professional practice, as we have seen over the past few years, restricts even more the margin for manoeuvre to attain a broader and more ambitious strategy for publicizing European film heritage.

- It is more and more the case that footage whose rightsholders cannot be identified simply remains sealed in boxes for want of a reasonable system for responding to requests to use it. The lack of a European public film registry and the absence of plans to set one up confirms that this problem remains underestimated in most of the Member countries and even at EU level.

Consensus

When it comes to film heritage, film libraries and archives do nothing to protest against the copyright legislation in force, thus fully sanctioning its legitimacy. It is undeniable that the creators and rightsholders should control the

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Gaetano Stucchi, *Media Consultant, Eurovisioni*

circulation of works. We should stress that it could even be reinforced, as the aesthetic integrity of films is far from always respected when they are broadcast over the electronic media!

As regards the rights of unidentified rightsholders, on the other hand, a consensus might be reached on a type of licence which could be granted by copyright societies (SACD, SIAE, etc.) or equivalent bodies in candidate countries.

To examine all these questions more strictly, we might imagine a partnership between the creators, rightsholders, film libraries and archives, and all the other players in the audiovisual industry in a bid to conserve and publicize the European film heritage in the broadest and best possible way. The European Union ought to actively support this partnership and grant it the resources it needs to achieve the aims defined.

The TV channels and festivals that publicize our film heritage, with respect for the works concerned, are well known. ARTE (and many other theme channels) schedules films belonging to this heritage. This

effort must be supported since it enables us to reach the younger generations as well as those audiences that have no access to the film clubs to be found in cities.

Specialized festivals (e.g. those held in Bologna or Pordenone in Italy) or homages and retrospectives held as part of a large number of European festivals (Valladolid, Tours, etc.) enable rare examples of this film heritage to be screened.

New creations

Along these lines the 15x15 initiative run by the European Coordination of Film Festivals, which presents 15 films from 15 EU countries at the 15 festivals held in those 15 EU countries, is an example of broadly publicizing our film heritage throughout Europe with the ambition of combining the aims of discovering and restoring this heritage.

As this heritage is also important as a catalyst for new creations, the creators themselves need to have access to the works it comprises. We should facilitate and encourage this creative work that draws on the collective European audiovisual

memory, representing a second-degree enrichment of the heritage itself whose exploitation problems it shares. This re-creation work (cf. the MAP-TV experience in the MEDIA 1 programme), by its fertilizing power, can promote our European cultural identity, and this is not the least of its qualities.

Finally, publicizing our film heritage has an educational role that is perhaps even more important than any other. Giving schools, universities, research centres, etc. access to our film heritage is a priority and a duty that justifies and influences all our efforts. This educational value includes the social, industrial and artistic environments of moving pictures which are also described through production shots, interviews, letters and any other available resources (the BFI's *screenonline* project is an excellent example of this). If we do not manage to make future generations aware of this heritage, all the work carried out to date, and which we would like to carry on, would be devoid of all purpose.

Over the next few months the European Commission will be evaluating the medium-term results of the MEDIA PLUS programme. The conference delegates, on behalf of all the organizations and professions they represent, would like this process to answer the questions that arise from the work and contributions as a whole:

- Has what the European Union done so far to defend and promote its film heritage been sufficient and efficient?
- In the very likely event of a negative answer to this question, what specific measures does the European Commission intend to take to amend and improve this situation?

zing

European heritage

Digital television

Arne Wessberg
President,
European Broadcasting Union

Digital technology is a cultural and an industrial revolution, which will invade every facet of life.

Broadcasting is no exception. Either we change our broadcasting to digital or, like the steam ships of old, we will pass into history. This applies to both television and radio. The timetable for the transition will depend on many things but the inevitability of the change cannot be disputed.

One of the decisions we take is whether to actively participate in the change process, to make it orderly, when and where we want it, or to leave it to the winds. Most European broadcasters and governments are in favour of the former. They are actively planning how to make the transition to digital broadcasting. Such things are like a mathematical equation, where you balance the relative advantages and disadvantages of being early or late.

Being 'first comers' can mean benefits for local industry, earlier

savings from the efficiency of digital technology, and establishing an international lead. Getting in early is how Bill Gates made his fortune.

But, there are risks in being early. You are trying out new business models and technology, and evaluating public taste in untried areas. There is a risk that you may get it wrong. The second comers don't need to repeat the same mistakes. The earlier you are, the higher the risks, but also the higher the rewards, if you get it right. This is, to some extent, the equation of life.

When we look around at the European situation for digital broadcasting we can see these processes being enacted. There are ventures that started early and succeeded, and those that started early and failed. There are countries and companies who have timetables

for digitalization in the next few years, and there are those whose policy is 'wait and see'. These may well take all the right decisions based on what others have done, but they will always have a 'second division' broadcast and media industry.

One mistake not to make is to assume that you no longer need terrestrial broadcasting, because satellite services are seemingly available everywhere, feeding viewers directly or via local distribution systems.

It is true that digital satellite broadcasting provides vast choice for the viewer – and the average cost of serving each viewer, after the initial costs are amortized, is low. We need to be part of it. But we need digital terrestrial broadcasting as well.

Plurality

Apart from the encouragement to competition and the efficiency of having a plurality of means for delivering television or radio, digital terrestrial has particular strengths. It is a way to ensure that at least one broadcast infrastructure is in national hands – and that failure of just one transmitter does not black out the nation. Furthermore, when we look at the cost equation, we already have national analogue

terrestrial

a challenge for Europe

transmitter networks that can be used again for digital.

Only terrestrial broadcasting is adequate for reception on portable receivers. The process of getting it installed in the home can be much less of a drama than satellite broadcasting. It is the most 'user-friendly' and 'work everywhere' way to provide digital broadcasting. In spite of the large transmitter network you need – which by and large we already have anyway – it is definitely worth doing.

No one can claim that digital broadcasting of any kind – satellite or terrestrial or cable – is a gold mine, an easy or self-evident way to make money. If you look at Europe's digital satellite services you find none has had an easy ride. The one that appears to be the most prosperous – BSkyB in the United Kingdom – has done so by using the deep pockets of its massive parent company to subsidize long years of losses.

Challenges

Cable companies too, across Europe, face challenging financial times as they make the transition to digital. But one thing they all know is that, sooner or later, they have to do it,

and the sooner they get over the pains of transition, the better it will be.

In digital terrestrial, the two first digital terrestrial broadcasting services were in Spain and the UK. The business models they used were not dissimilar. They were a mixture of free-to-air and pay-TV services, with subsidized receivers.

In both cases, the free-to-air services were assumed to ride on the coat tails of the pay-TV services on the same 'platform'. Alas, both pay-TV services faced large, already existing, competition from pay-TV via satellite. Neither had the financial strength to ride out what was going to be a long and slow road to profitability. Both failed. Whether it could have been foreseen or not, we have to

conclude that such a business model would need a very long time to reach profitability.

One interesting fact is that one of our two UK Members' digital transition (the BBC) was partly funded by the proceeds from the sale of their transmitter network. They were obliged to sell it by the UK government. We would not suggest selling transmitter networks is necessarily in the public interest, but it does highlight the fact that the transition needs substantial funding.

Experiences

Today, the UK is trying a new model that is all free-to-air programmes and no receiver subsidies – though the receiver industry had been encouraged to make very low cost receivers (about €150). This new

formula has been only tried for a few months, but the signs are that this model will work for them. The expectations of our Spanish broadcaster and EBU Member RTVE are that Spain is likely to follow the same model, but the Spanish government is still deliberating.

Many eyes in Europe are now focused on Germany, and Berlin in particular, where in recent months digital television broadcasting has begun. This is also an ‘all free-to-air’ model. Once more, the receiver industry has been encouraged to make low cost ‘set-top box’ receivers that simply plug in to an ordinary TV, and in this case provide over 20 TV channels. Today, every single receiver that hits the shops is being sold, and there are over 20 companies making, or planning to make, digital receivers. The jury is still out, but the signs are very good that this will also work.

One thing that makes the German plans unique is that there is intended to be almost no transition period between the end of analogue broadcasts and the start of digital broadcasts. The analogue transmitters will literally be switched off within months of the digital broadcasts starting. Analogue broadcasts are not much used in Germany anyway, and by having a very rapid switchover, large economic benefits will be realized. The rest of Europe and Germany is watching to see if this speed of change will be socially acceptable. If this pattern works in Berlin, it will be repeated all over Germany.

In France, the technical planning for digital terrestrial broadcasting and the call for candidates has been done. It seemed likely to be a mix of free-to-air and pay-TV services. The plans are still in place, but they have recently been delayed by several years, as politicians have become nervous about whether the business

plan can succeed, and about the relative future of digital terrestrial television and services delivered by broadband networks to the home.

My own country, Finland, is well advanced in the rollout of digital terrestrial broadcasting, and services have been on air since 2001. Other Scandinavian countries are already broadcasting, or plan to do so soon. I have to tell you we have been frustrated by the lack of receivers that can use the European consensus-developed multimedia system we selected, termed MHP. However, this same system is now being used in Germany and the rest of Scandinavia, so we expect that this will precipitate much larger production of these receivers. It should also be said, to be fair to the receiver manufacturers, that only in the last months have the tools become available to test MHP receivers before they are put on the market, so there were legitimate reasons for their slow arrival.

Failures

There are many other stories to tell in Europe, which time does not allow. It would be true to say that the initial failures in the UK and Spain sent shockwaves across Europe, and prompted a number of countries to delay their starts by a few years – just to be sure that it was possible to tame this wild animal.

If you wait long enough for your neighbours to make all the business mistakes you will certainly get it right. But, at the same time, you will be using inefficient analogue technology and losing out in the know-how race for the electronic media.

Like anything worthwhile, digital terrestrial broadcasting is difficult. Much of its value comes in the hidden benefit to the citizen of being able to make his life better with the

media – it is by no means just a matter of buying and selling the wires and resistors of the receiver as a commodity.

National governments need to help digital broadcasting to happen, because it is so important and valuable to the community. National governments must establish a plan and a timetable for digital broadcasting – because they are the only ones who can. They must also help the public service broadcasters to fund the transition, because our national broadcasters are not large international corporations who have vast funds and who can stand years of cash outlay.

In technical terms, the digital broadcasting world owes much to the genius of Italian engineers such as those at the RAI Research Centre in Turin. Our hope and expectation is that Italy will also be among the pathfinders for digital broadcasting and content itself.

The word ‘television’ comes from the classical world. It is half Latin and half Greek. The Latin part, ‘vision’ not only relates to the media, it also appropriately describes what governments need at this time, when they consider their actions for digital terrestrial television. It is an investment for the nation.



Launch dates of digital terrestrial TV

(source DigiTAG)

In operation

DTT Forecast
(test transmission currently in operation)

2003

Germany

(except Berlin – launched in 04/2002)

Netherlands

Norway

2003/2004

Italy

Portugal

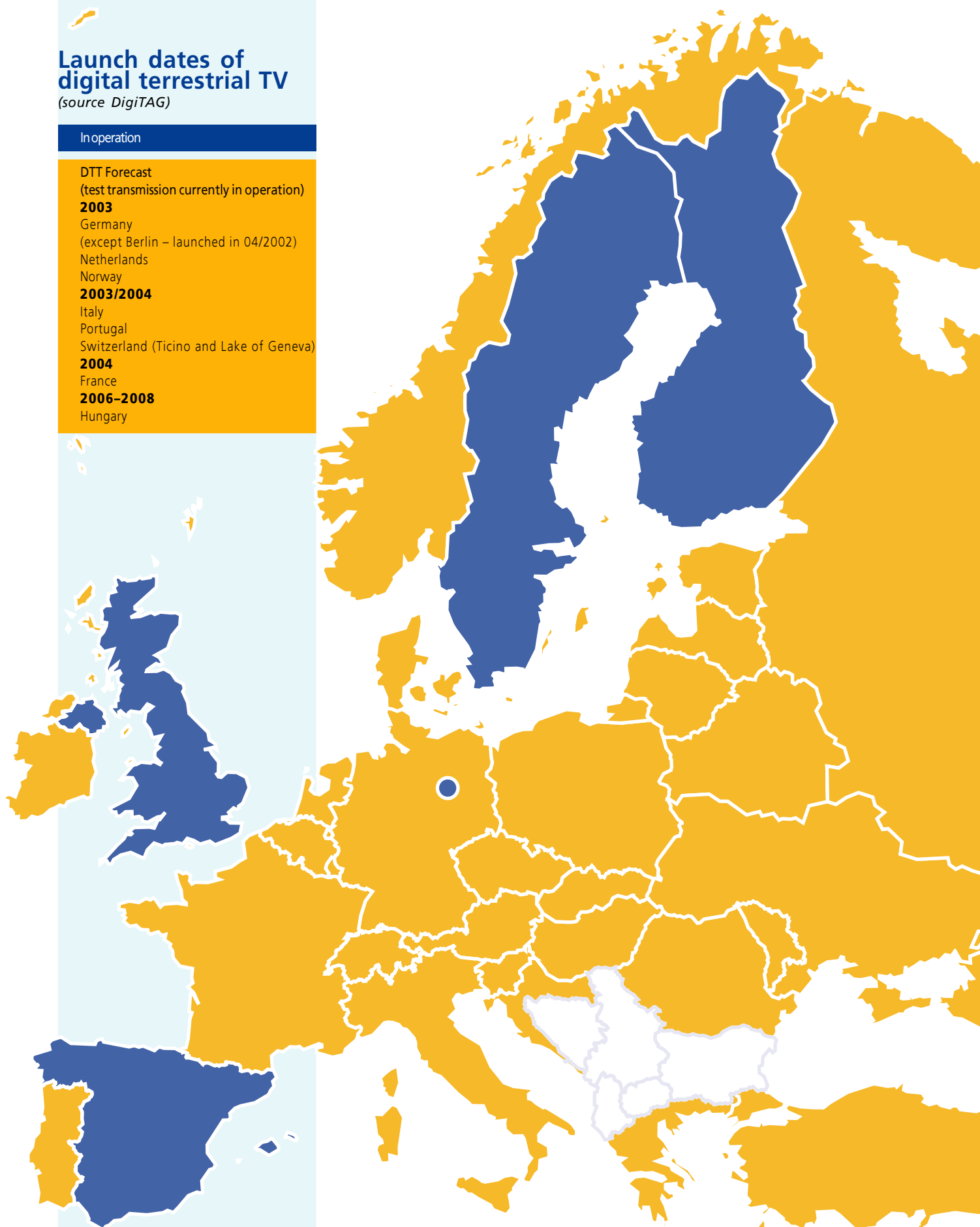
Switzerland (Ticino and Lake of Geneva)

2004

France

2006–2008

Hungary



DTT, a complex yet hardly innovative technology . . .

. . . being rolled out in the frequency bands currently used by analogue broadcasting, contains many intrinsic weaknesses:

Major coverage limitations (as, for example, in France):

- Exclusion of catchment areas that are essential to the launch of DTT: Amiens, Valenciennes, Douai, Nancy, Strasbourg, Dijon, Massif Central, Montpellier, Nice, for instance.
- Multiplexes with different coverage (many homes in the DTT reception area will not receive all programmes offered by DTT).
- Ultimately limited to 70% of the French population. Beyond this, the frequencies are impossible to capture and the broadcasting costs rise exponentially.

Complex to install:

- Complex distribution of the product owing to coverage limitations.

- Acquisition and installation of a new terminal.

- Acquisition and installation of a Hertzian antenna or adaptation of the existing installation for the majority of homes. Many antennas have been dismantled by cable operators in French cities. Of the existing antennas, 32% of individual antennas and more than 50% of collective antennas will need to be adapted (source: SNIDA).

In addition, with its reduced offer of less than 40 channels, DTT has many handicaps and yet offers no particular advantage over cable and satellite networks, as portable reception has limited coverage and mobile reception is still at the development stage.

These many constraints considerably restrict DTT's prospects of market penetration. In other countries DDT's market penetration three or four years after the launch has not exceeded:

- a few tens of thousands of households in Sweden;

- 1.2 million households in Great Britain, despite huge, expensive marketing campaigns (free receiver and bankruptcy of the operator).

The reality is easy to see: there cannot be a market for a product that does not correspond to any major demand from consumers. Householders are already spoilt for choice with cable, satellite and DVD. DTT is doomed to be buried alongside D2MAC.

Furthermore, contrary to widespread opinion, DTT will not enable useful spectrum to be freed up. In the (improbable) event that analogue broadcasting is shut down, it will be impossible to free a 'frequency band' on account of the fact that DTT networks mesh with multi-frequency analogue networks. At most, all that will be freed are local frequencies of no great economic interest.

Finally, deploying DTT networks disturbs the reception of analogue channels owing to the large number of readjustments it involves.

DTT is neither a revolution (digital has already existed on cable and satellite networks for more than seven years), or a step forward in the terrestrial analogue broadcasting network. At the very most it is a new,

DTT

the syndrome of failure foretold

Patrick Le Lay
President Director-General, TF1

scarcely innovative, additional network which will face competition from cable, satellite and audiovisual content distributed via ADSL.

Television via ADSL on the other hand is a burgeoning technology that we believe to be far more innovative: extended offer, plug-and-play installation via the telephone socket, offer combined with broadband Internet access, and a high-bit-rate advanced return line.

It is amazing to find that, at the dawn of this new technology, so much energy is being pumped into DTT, which is ultimately a technology devoid of a future!

Flops

Its failure can be explained by the lack of any viable market and economy. So far three countries have tried DTT:

Great Britain launched ITV Digital in November 1998:

- After ruinous competition with BSkyB over football rights and, especially, set-top boxes, the company ceased broadcasting and is now in liquidation.
- Granada and Carlton, its two shareholders, have lost more than £1.5 billion since the launch, putting into great difficulty the free-to-air analogue channel (ITV) they control.
- The possible relaunch of DTT in Britain by Sky in association with BBC with a reduced offer will only reinforce the dominant position of Sky on the British market.

Spain launched Quiero TV in April 2000. As it never managed to attract more than 150,000 subscribers, the company lost €700 million before closing down.

Sweden launched Senda in 1999. After a commercial failure, the State

took over all operations. DTT has not attracted more than 70,000 subscribers and the main private operator MTG closed down its channels in August 2001.

A total of almost €4 billion has been lost in three years, and no company has survived. At the same time DTT has destroyed a lot of value and weakened the groups to have supported production.

In the light of these resounding failures, it is highly unlikely that any other countries will be launching DTT projects before 2005:

- Germany, a country with 93% cable and satellite coverage, made a theoretical choice in favour of mobility, making DTT experimental in the beginning; its priority is to switch cable digital.
- France is still examining what is possible: the project of France Télévisions has been adjusted; publication of the list of channels has been postponed pending the possible suspension of the procedure; debates on financing adjustments of analogue systems; evaluation of impact on production facilities, and so on.
- Italy, faced with a total lack of spare frequencies on account of the large number of local channels has a vague framework law and its pay-TV channels are faced with disaster (Telepiu/Stream).
- The Benelux countries are facing unsolvable planning difficulties (large amount of international coordination), reducing coverage to small pockets that have no great interest for marketers.

In this situation, any discussion of a date for phasing out the analogue system appears to be totally out of touch with reality.

Disaster

Disaster has struck in European broadcasting. The cable and pay-TV sectors in Europe are in a catastrophic situation; the European advertising market has shrunk like never before; ITV Digital, Quiero and Kirch have gone into liquidation; Canal Plus is on the brink.

Against this background, launching DTT would weaken European broadcasting even more to the benefit of US groups.

Weakening European broadcasters results in a weakening of the revenue they generate which in turn results in a drop in the resources they invest in European cinema production which is directly dependent on their good financial health.

A free offer?

The idea of offering European viewers a new free TV service would appear generous but it is wrong to believe that it can be free for the taxpayer. Television broadcasting only has three sources of revenue:

- Advertising, which has dropped sharply in recent months, is totally absent on markets with low penetration, as it is only attractive on channels with high ratings.
- Pay-TV, which is much more attractive via cable and satellite (as the offer is greater).
- And finally public funding, which at present is already finding it difficult to finance existing channels.

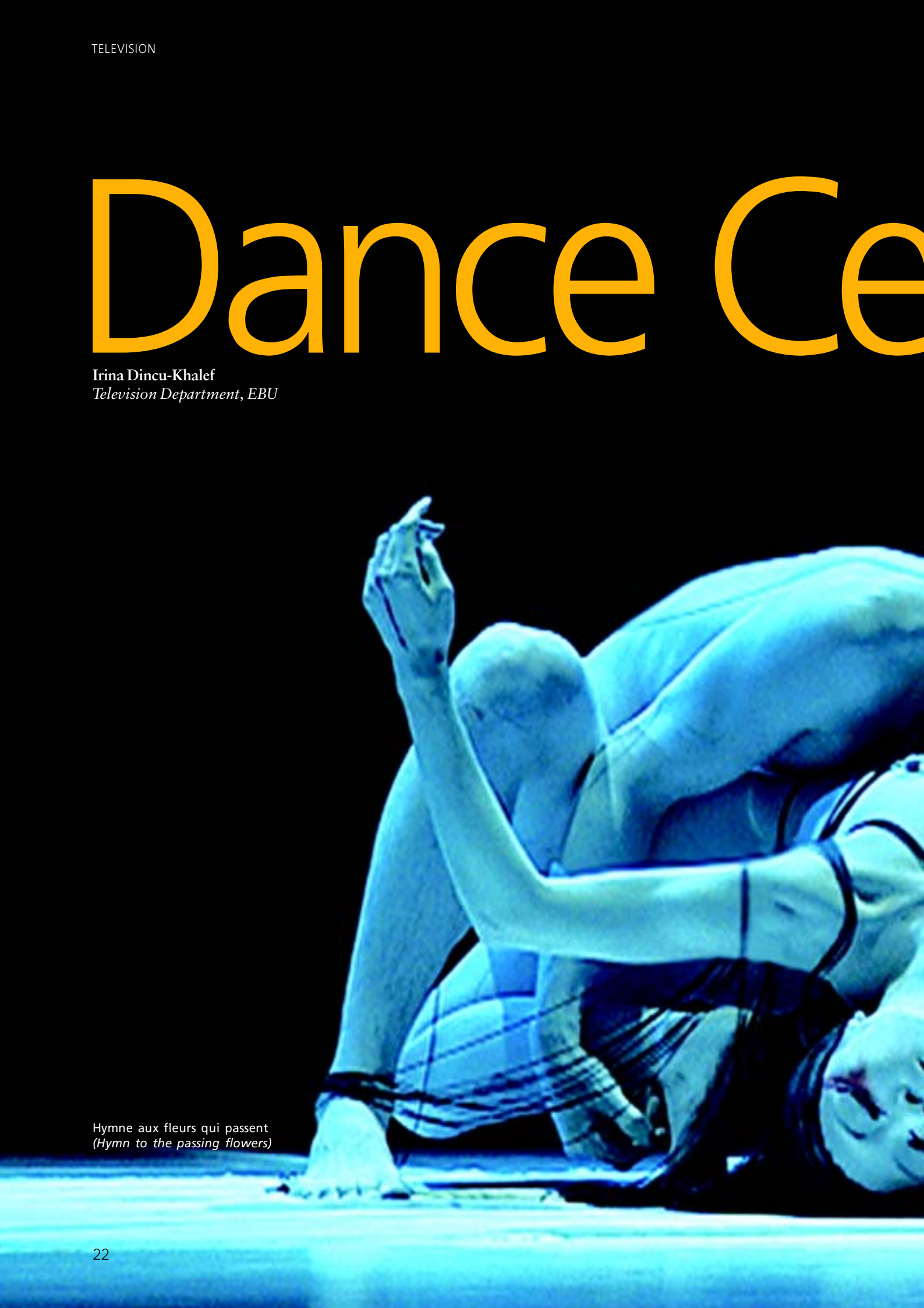
The past few months have shown, with the bursting of the Internet bubble and the huge difficulties encountered by the major television groups and telecoms, just how impossible it is to escape from economic realities.

DTT is no exception to this rule.

Dance Ce

Irina Dincu-Khalef
Television Department, EBU

Hymne aux fleurs qui passent
(Hymn to the passing flowers)



celebration!

ARTE and 13 broadcasters for an exceptional show.

On 27 November 2002 dance enthusiasts were able to witness a show of exceptionally high quality. For the first time a dance gala was specially created for a live broadcast at a venue known to all dance enthusiasts, the Maison de la Danse in Lyons. Conceived as a creative venture between the Maison de la Danse in Lyons, Films Penelope, Paris, ARTE France, France 3 and the EBU Music Group, this exceptional dance programme was made available to audiences throughout Europe.

“When we first met with ARTE to discuss this programme over two years ago, none of us were sure that we could actually make it happen, but we all recognized the artistic quality and we all felt that it was worth the effort. We are very pleased

today that so many EBU Members joined in this production and that we have been able to make it a truly European event. And we are proud that it was watched and appreciated by audiences that love dance throughout Europe,” said Katharina von Flotow, EBU head of development.

Eight of most renown choreographers and dance companies were performing on stage at the Maison de la Danse in Lyons and the event was broadcast live during prime time by ARTE. The EBU negotiated the rights for this event on behalf of 13 EBU broadcasters: RTVSH (Albania), RTBF and VRT (Belgium), ETV (Estonia), YLE (Finland), RUV (Iceland), NRK (Norway), NPS (Netherlands), TVR (Romania), BBC (United Kingdom), RTVSLO (Slovenia), SVT (Sweden), DRS (Switzerland).

Babelle heureuse, the first piece, created by Montalvo Hervieu in February 2002, takes us to the theatre within the theatre. The two choreographers use the metaphor of the red curtain to introduce us to the magical atmosphere of the theatrical world. The title is a word play on the Tower of Babel (*Babelle*, with two Ls, because ‘tower’ in French is a feminine noun and Montalvo

Hervieu felt that it was appropriate) conjuring up a person and the tower itself – a metaphor of the show; the piece is a hymn to joy. The spectator discovers in turn classical dance (ballet shoes), modern dance (hip-hop) and acrobatic dance, to traditional Iranian music played by Shanbehzadeh and Meftahbousheri, who also dance.

The background is a screen showing pictures recalling fairy tales and legends. The dancers interrelate with the characters on the screen, in an enormous *trompe l’œil*, giving the impression that the characters are jumping out of the screen to sing and dance on stage before us. Another innovation, the mixture of musical genres: traditional Persian music, Bach and Vivaldi. The musicians dance and the dancers sing. Each one plays a role in the scene played by the other while maintaining their own specificity. The result is fabulous.

The spectator goes from laughter to astonishment, with Hymn to the passing flowers, a slow piece in which the movement of bodies is imperceptible. The two dancers, painted white with long black hair (a reminder of the sensuality and sexuality in each of us) perform together a *pas de deux* of exquisite

aesthetic beauty. The Yin and the Yang come together, form a whole, and separate again, desire each other without ever touching, in perfect harmony.

Then Christopher Wheeldon, a young choreographer who tends towards the classical, directs Darcey Bussell and Jonathan Cope, two inimitable stars of the Royal Opera. To music by young Scots composer James MacMillan, the dancers form a *Tryst* – a languorous *pas de deux*.

Suddenly the rhythm changes! Andrés Marin, a well-known guest of the Maison de la Danse comes onto the stage to present a *nuevo flamenco*. This piece *Emilia*, that the dancer composed for his wife and that he dances dressed all in black and with a T-shirt (the modernism is not only apparent from the dance style – spirited and energetic – but also in the appearance – the “dress code”), is a combination of past and present. With five musicians and three dancers on stage, Andrés Marin introduces another dimension to the rhythm, music and flamenco.

When Bill T Jones comes on with his troupe, the background is a fuchsia-red flower that is somewhat reminiscent of Pop Art. Although we



Babelle heureuse

might have the impression the piece vividly coloured, the emphasis, as in all of Bill T Jones's work, is on the choreography. Despite its undeniable modern tone, this piece still reminds us of ancient American dance.

Then a homage to one of the greatest – if not **the** greatest – dancers of all times, the DANSEUR *par excellence*: **NIJINSKY**. Created by John Neumeier, this piece recreates the moment of love at first sight between Nijinsky and his wife when they met on the boat taking them to America. The ballet tells the life of Nijinsky, his psychology, his mysticism. Several different people and characters inhabit the great dancer: a man on the verge of madness and the star danseur. Which one is the woman attracted by? Which is the one she truly loves? Which one receives that love? These mysteries and this duality that the choreographer willingly maintains in his three characters are supported by the music of Rimsky Korsakov that adds a foreign, oriental touch to the whole performance. A magnificent exploration of interior and exterior worlds.

Jiri Kylian created the piece called *One of a Kind*, “a poem to freedom, a tribute to all liberties of personal expression”. This supple and vigorous *pas de deux*, in which each of the dancers is willingly enclosed by the other dancer's movements, is a masterpiece in which technique is combined with contemporary and neoclassical dance.

Schrödinger's Cat, the last piece in the show sees Karole Armitage direct a very personal vision of quantum physics. The dancers are all in black, with masks hiding their faces. They move along lines that have been carefully defined by the choreographer, in a performance that combines classical and modern dance. The dancers are scattered around the stage but, in fact, obey the laws of physics.

For a finale in apotheosis, Montalvo Hervieu thought up one ultimate joyful choreography in which all the dancers come back onto stage for a performance mirroring the specific nature of each choreography.

The EBU Television Department was happy to collaborate in this exciting wager and in doing so bring to audiences throughout Europe the best in contemporary choreography.



Tryst

DAB

Leif Lonsmann
Managing Director, DR Radio

Until a few years ago, we were still at square one...

...technical standards had been established, frequencies had been reserved, the location of transmitters had been planned and a strategy was ready. Our digital promise to the listeners went like this: we will give you better sound, on a single frequency, all over the country. If you just buy new receivers.

But listeners didn't buy new receivers. They even didn't ask for them in the stores. So the stores didn't ask the manufacturers to provide them.

A vicious circle

We were trapped in a vicious circle. Everyone was waiting for everyone else! The government didn't want to spend money on building transmitters if we didn't broadcast. And no one wanted to buy receivers if they couldn't receive. So no one listened to digital. And with no one listening, we did not want to spend money producing programmes for digital radio. And as we didn't broadcast, the State didn't want to spend money on transmitters.

Somebody had to break the vicious circle. Manufacturers or the retail business had to be persuaded to supply their customers with cheap receivers. Or the listeners needed

a success story

persuading to buy expensive radio sets and wait for the programmes to come. After some time, we believed, the market would bring prices and people's willingness to pay into equilibrium. And THEN we could start building transmitters and eventually put something on air! But we didn't manage to persuade either the industry or the listeners.

So we changed our strategy! We decided to break the vicious circle ourselves. We started to set up transmitters in order to cover the whole country. In just two years! With regard to the actual programming we realized that better sound and single frequencies were not enough on their own, our listeners were satisfied with both the quality of the FM sound and our programmes. Our listeners didn't even ask for more channels. What did they ask for, then?

A look at the hundreds of calls and letters we received from our listeners every week showed that they wanted us to broadcast their favourite programmes at other times. Jazz listeners wanted jazz in the daytime, and not only in the evenings. Listeners to classical music, on the other hand, didn't want to find jazz – or even worse, pop music – when they tuned in. Young people wanted the radio to play *their* music all the time. People who couldn't listen during the day wanted us to re-broadcast talk programmes in the evening. And those who listened all day didn't want all the re-broadcasts. Everybody wanted the news. They didn't want it repeated every hour though, but it should be there when they needed it: when they got up, when they got into their cars or when they came home from work. The problem is that they didn't want any of these things at the same time... they just wanted their channel to

play what they wanted, when they wanted!

We learned that *choice* and *time* were the keys to the listeners' ears and hearts. No great surprise, really. Time and choice are the drivers of all technological development when it comes to media. The Internet has taught us that we don't have to wait for someone else to present what we want. It's there all the time. And we spend money buying all sorts of gadgets that make us find and get it: mobile phones, CDs, PCs, MP3s. These are the times we are living in. We are busy and we don't want to wait to get what we want.

It's cheap too

At DR we chose a radio strategy based on more choice and less dependence on time. And this is exactly what digital radio can provide. And it's cheap!

So, now we are getting closer. On 10 October 2002, we switched on digital transmitters covering 70% of the country. In March 2003 we will cover 100% of the country.

And now for the programmes. The slogan is “Get *what* you want, *where* you want, and *when* you want it.”

Analogue radio liberates the listener from place. You can enjoy news, music, entertainment, concerts and company wherever you are: in bed, in the car, in the kitchen. On the road, at the office, on the train or on your bike. But with analogue radio, we cannot get the programmes *when* we want them. Analogue airwaves float on time: you have to have the radio on at the right time to catch the waves. We are slaves of the waves!

Digital radio signals, however, can be tamed. And that’s what we are doing. We don’t produce a lot of new stuff. But we pack the stuff we have, including our music, into packages, easy to pick directly from the digital receiver.

Here are the packages we will be able to offer when we go nationwide in March 2003:

DR Klassisk provides EBU concerts, our own concerts, opera trans-

missions, the best programmes and records from FM. And information about what is playing is shown on the digital radio set display.

DR Plus presents news, background, discussions, features, radio drama, history, literature & readings, science & technology, etc. Additional information will be given on the display.

DR Skum (what an ugly name!) carries popular dance music for the 12- to 20-year-olds, around the clock, with virtual radio hosts and interaction with our youth community on our home page and with TV programmes. And on the radio display.

DR Nyheder offers the latest news programmes from FM. It’s packed in a loop so that you always get the latest news no matter the time. Breaking news comes up as it happens, and we supply the news updates and background. Headlines can be presented on the radio screen display.

DR Jazz gives you the best jazz of all time from FM: records & profiles and recordings with our own Big Band. Later, programmes from our Nordic sister stations will be added to the package. Additional information will be given on the display.

DR Rock plays the guitars of the 1960s onwards: Zeppelin, Stones, Clapton . . . You name it, we play it! And artists and titles will be on the display screen instantly.

DR Soft is the soft voice of DR. Pop, hits . . . and a little soul. From Céline Dion, Savage Garden and Elton John to Whitney Houston, George Michael and Chicago. Along, of course, with Danish ‘softies’. Artists and titles, and ‘what’s coming up next’ is, of course, on the display.

DR for Born is the digital radio universe for children. With music, fun, stories and fairy tales – when the kids demand.

DR Sport takes you directly to the sports arenas of the world. As the game plays. Results are shown on the screen.

You can also get most of the stuff on FM. And therefore it is not much more expensive for us to provide. But through digital packaging and distribution, the listeners can get it all the time. When they want and for as long as they want. And with no interruptions. These are the times we are living in.

We are ready to go. But we don’t know how the listeners will

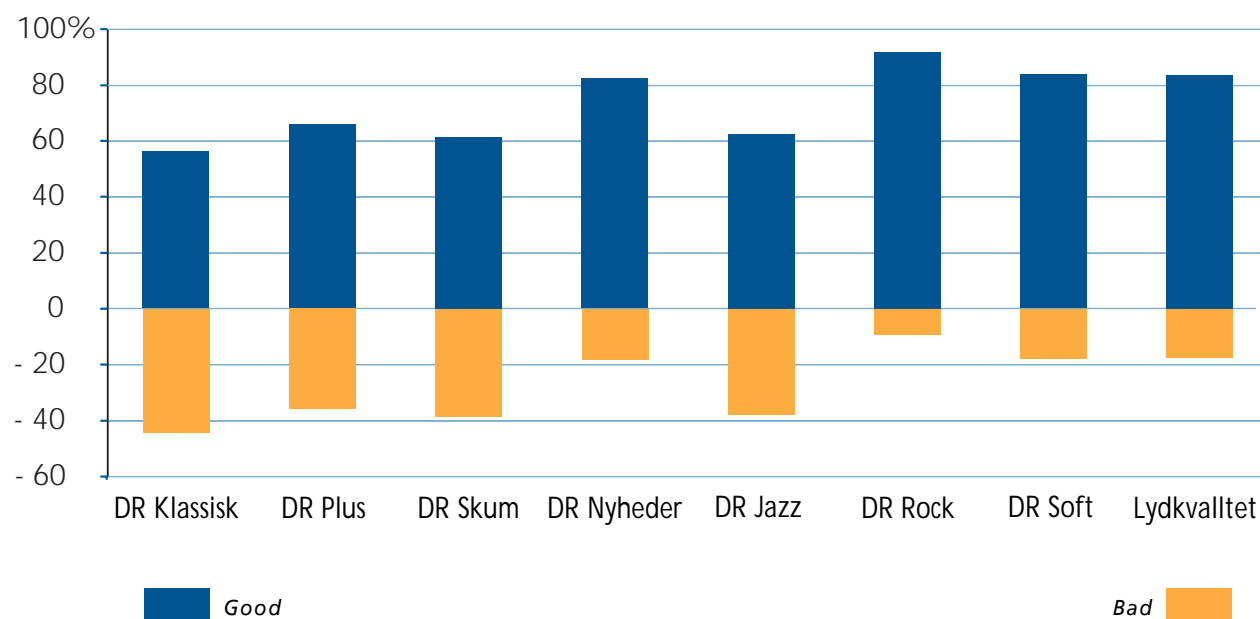


welcome our digital offer. But over the summer we have tested it on two distinguished groups of listeners: enthusiastic hi-fi listeners – and taxi drivers! And here is the result of the Danish jury . . .

Based on the feedback from our test panels, they like the opportunity of

being their own editors. The ‘press-a-button-and-you-get-what-you-want’ concept seems to have conquered our panel’s listening habits. They like it. And, as for the sound quality, they are also satisfied even though we have squeezed more signals into our multiplex than our own technicians have recommended.

This is – so far! – a success story. Its popular, it’s digital – and it’s cheap!



DRM

Michel Penneroux
Head HF Broadcasting, TDF;
Chairman, DRM Commercial Committee

commercial challenge

An event will shortly send shockwaves throughout the entire AM broadcasting world.

During the International Telecommunication Union's World Radio Conference 2003 (WRC03) in Geneva this June, some of the world's best-known broadcasters will begin transmitting permanent programmes worldwide on short and medium waves using Digital Radio Mondiale™ (DRM™) technology.

DRM is the world's only non-proprietary, digital system for short, medium and long waves (SW, MW LW) with the ability to use existing frequencies and bandwidth across the globe.

Quality

With clear, near-FM quality sound that offers a dramatic improvement over analogue AM, DRM will revitalize the AM broadcasting bands below 30 MHz in markets worldwide. The crackle and pop of analogue AM will be replaced by the digital clarity of

DRM, which will create exciting new opportunities for broadcasters to expand their AM audiences and increase time spent listening.

DRM-capable receivers should be available in the European marketplace within the next two to three years.

Frequencies

DRM's launch should create a reversal of the current industry trend of downsizing SW and MW broadcasts. When existing AM listeners become aware of the vastly improved audio quality available to them through DRM, they will renew their loyalty to AM broadcasts and welcome the expansion of AM services. Furthermore, the benefits of DRM will provide national and international broadcasters worldwide with significant opportunities to attract new AM audiences.

DRM presents another advantage: it will be easy for network operators to get DRM started: all they have to do is install the exciter and make minor adjustments. No annual user charge is payable for DRM. Nevertheless, operators with old transmission equipment will need to renew it. The aerials will remain the same, except for LW which will still require a fairly complex tuning process.

Commercial challenge

In spite of these bright prospects, DRM must face the hazards inherent in bringing a new broadcasting system to the market. For DRM's commercial rollout to succeed, it will be necessary that four vital industry elements – universal standardization, regulatory acceptance, DRM programming by key broadcasters and the availability of DRM-capable equipment (especially receivers) – emerge simultaneously.

Standardization

From its founding in 1998, the DRM consortium has been working towards achieving this goal. Indeed, the consortium's membership is structured to bring together key industry players. DRM now has 77



members from 30 countries, including:

- regulatory bodies,
- broadcasting unions,
- broadcasters,
- network operators,
- research laboratories,
- transmitter and receiver manufacturers.

On the universal standardization front, DRM achieved a major milestone on 31 January 2003, when the International Electrotechnical Committee (IEC) gave the DRM system its highest stamp of approval: the International Standard. DRM has also received a recommendation from the ITU and a key endorsement from the ETSI (European Telecommunications Standards Institute).

The regulatory path for DRM has opened up. A change in the Rules of Procedure by the ITU's Radio Regulations Board cleared the regulatory path for broadcasters who

want to use the DRM system for the MW/AM and LW frequency bands. With this change, any broadcaster in ITU Regions I and III now has clearance to use DRM in MW/AM and LW.

Tests

In preparation for DRM's inaugural broadcasts in June 2003, worldwide test transmissions have been under way for more than three years now. In December 2002, DRM invited radio enthusiasts to join an innovative experiment, the DRM Software Radio Project. The project enables radio amateurs and DXers who purchase the software to hear DRM's test transmissions using a PC-based radio. Already, several hundreds of people are participating.

And as WRC03 draws near, DRM's broadcaster members are preparing to transmit their first-ever, real DRM programmes in June.

DRM has already begun showcasing DRM-capable broadcast equipment, including receivers, at major industry events such as IBC in Amsterdam, IFA 2001 in Berlin and NAB in Las Vegas. Last year, DRM unveiled its pioneer, production-ready OEM consumer receiver. It is a world-band receiver, based on a modular system design made up around standard components. It offers equipment manufacturers a low-cost track towards the mass production of DRM receivers.

Acceptance

AM is showing encouraging signs of growth, and these are not lost on the operators. In view of the scarcity of frequencies, many deprived of access to radio are today turning to DRM-delivered digital AM. Thus, we are witnessing the emergence of new operators on MW, new projects on the part of existing operators and new prospects for international radio which suggest that operators will be



the main beneficiaries of the DRM effect.

New receivers

Current receivers will not be up to reproducing the digital quality provided by DRM. To enjoy DRM listening will require new receivers. From this viewpoint DRM will be a major contributor to the advent of digital receivers on the mass consumer market. Just as other innovative systems are having trouble creating their own market under their own brand, so DRM's priority ambition is to be on the long awaited digital receivers.

Thus, the receiver manufacturers in Eureka 147 countries (mainly Europe and Canada) will install DAB and DRM in their digital receivers. Consumers will not need to worry about the technology: they will own a receiver giving them access to digital radio, be it DAB or DRM. In other countries DRM may be the only option chosen to bring digital radio to markets. Prices will be slightly higher (10–20%) than at present, depending on the country.

The DRM working programme to finalize the electronic chip anticipates that receivers will be on the consumer market by late 2005.

Marketing

Clearly, the momentum towards DRM's market rollout is building fast.

All the components of the marketing mix are in place; what is needed now is to put them into effect. This is the job of the DRM Commercial Committee which is actively engaged in cultivating and constructing national, commercial teams in each of DRM's targeted launch markets. These national teams include DRM members as well as non-members and they exist already in some markets.

For example, DRM has built a strong presence in Germany, with a national team made up of leading broadcasters, network operators, manufacturers and others in the broadcast value chain. The German group has already launched its own, German-language website, www.drm-national.de, linked to DRM's existing English-language website at www.drm.org.

The committee's strategy has a twofold aim: on the one hand, the creation of national platforms and, on the other, a strategic alliance with the major distributors. Such platforms exist in Germany, France, Russia and Nigeria, and others are in the process of being created in Canada, China and the Gulf states. The movement is gathering momentum through the major distributors' promotional efforts.

All the conditions for success are in place. The next two years will be decisive. For the moment DRM continues its demonstrations on SW and MW, while operators are starting their permanent programmes. DRM is continuing to promote itself with network operators to show its spectrum efficiency and the prospects it offers of reduced operating costs.

One major question remains, however: will current AM channel operators agree, for once, to promote their channels so as to position them as a new choice offered to listeners?

If they do, there is no doubt that their availability on the digital receivers available as of 2005 will be a guarantee of success.



BBC

Proms

Nicholas Kenyon

Director, BBC Proms; Chairman, EBU Radio Committee

Great music for everyone.

Over a century ago, an adventurous music impresario, Robert Newman, and a talented young conductor, Henry Wood, met in an Italian restaurant in central London, and decided to launch a series of popular classical music 'Promenade Concerts'. They could not possibly have imagined that 108 years later their concert series would be a jewel in the crown of European public broadcasting and the envy of the musical world.

The Proms are so called because from the beginning those members of the audience who paid least had the best places standing in the 'promenade' area on the floor of the hall: their enthusiasm has always been the focus of the occasion. The aim of the first Promenade Concerts was to attract audiences to classical music, to educate and entertain them with the widest mixture of great classics and what Henry Wood called his 'novelties', the new works he promoted. The concerts began at the Queen's Hall, in London's Regent Street, which from the 1930s was just next door to the BBC's new home at Broadcasting House. After the Hall was bombed in 1941, the Proms moved to the Royal Albert

Hall in South Kensington where the concerts have happened every summer since. There the same arrangement of standing in the arena (as well as in the top gallery) has continued, and standing places still cost only £4 today. Queuing is a popular pastime, especially when the summer weather is good, and many friendships and even some marriages are made in the Proms queues.

It was when Robert Newman's Proms were in financial difficulties in 1926 that the BBC became involved. The new broadcasting organization's aim to popularize great music through the radio fitted well with the aims of the Proms, so from 1927 the BBC became the organizer and promoter of the Proms, with incalculable results for the development of musical culture in Britain. Henry Wood was positive and visionary about the BBC's involvement: he declared that with the advent of broadcasting his aim of bringing great music to all could now be realized.

Others were far less hopeful, believing that the broadcasting of concerts would kill live attendance



and ruin musical life. The opposite turned out to be the case: as well as being a broadcaster the BBC turned out to be a patron and a catalyst for the best of music. It founded its own BBC Symphony Orchestra in 1930 (on full-time contracts, then unheard of in Britain) which Henry Wood conducted at the Proms, and employed programme planners who brought important new music and world-famous soloists to the concerts. When Wood died in 1944, the BBC took over the sole responsibility for the Proms and has since developed them into the leading international festival of orchestral music.

These developments owed a great deal to successive BBC Proms planners (who were usually Controllers of Music for the BBC) who pushed forward the agenda of the Proms. It was William Glock in the 1960s who introduced the best of new European music to the season, with adventures from Messiaen and Berio to Boulez and Stockhausen, making the Proms a beacon for all that was most lively in the music culture of the time. He also supported the revival of early music, brought opera to the Proms with performances from Glyndebourne and Covent Garden, and for the first time gave prominence to the commissioning of new pieces for the season, nurturing a whole generation of composers like Harrison Birtwistle and Peter Maxwell Davies, now internationally renowned.

© BBC

Under Glock's successors, Robert Ponsonby and John Drummond, the scope of the Proms broadened hugely in recent decades, with a growing internationalism in performers and programmes. From being a purely British festival with at first only one orchestra involved, and then a small number of UK orchestras, it grew to invite orchestras from around the world, frequently including the leading broadcasting orchestras from European countries alongside great ensembles from Berlin or Vienna, Chicago or Boston.

My own aim has been to develop new formats like special days and weekends, enliven the programming with annual themes, explore more neglected works, and above all to make the Proms ever more universally accessible and available. We now mount the Proms in the Park on the last weekend of the season, drawing crowds of 40,000 people in Hyde Park to live music and a relay of the Last Night from the Albert Hall, and then many families the next afternoon for the Children's Prom in the Park. Now

these Proms in the Park are mounted around the country, and this year will for the first time be in all the UK nations: Wales, Scotland and Northern Ireland on a single evening, all reflected in the television broadcast. Over 70 concerts are now promoted in the season between mid-July and mid-September, with regular weekly chamber music concerts, pre-Prom talks, education projects and a major annual Proms Lecture.

At first broadcast on radio on various different BBC networks, the Proms are now completely associated with BBC Radio 3, our principal partner which broadcasts every concert live. The concerts are increasingly broadcast on television, and the famous Last Night of the Proms has become one of the most famous occasions in the musical world through its worldwide television broadcasts. In the last couple of years, digital television has increased that coverage considerably, with interactive elements which enable the audience to contribute views and opinions – and this year for the first time to choose part of a Proms programme. On the Internet all the concerts are webcast, and another new initiative is the availability of audio-on-demand recordings during the season on the Proms website.

In making the Proms as widely available as possible to listeners, the BBC's collaboration with the EBU has been vital, and the many concerts have been offered live or recorded through the invaluable summer festival programme of the EBU's music exchange. When the events of September 11 caused the 2001 Last Night of the Proms to be changed, it was possible at short notice to arrange for over 200 radio stations in the United States to receive the broadcast, a remarkable achievement.

In 2003 the BBC Proms, as they are now universally known, offer a





© BBC

typically varied and challenging programme with anniversary celebrations that include complete concert performances of Berlioz's *The Trojans* and Prokofiev's *War and Peace*. Greek myths provide a thread running through the programmes, with operas such as Tippett's *King Priam*, Strauss's *Elektra* and Purcell's *Dido and Aeneas* heard alongside many other concert pieces on Greek themes. The world's greatest conductors come regularly to the Proms, so alongside the BBC's own ensembles, led by the BBC Symphony Orchestra under its chief conductor Leonard Slatkin, we welcome this year the Berliner Philharmoniker in its first Proms appearance under Simon Rattle, the Vienna Philharmonic collaborating with the unique American composer/conductor/singer Bobby McFerrin, and a galaxy of other talent including Mariss Jansons, Valery Gergiev, Zubin Mehta and Christoph Eschenbach.

At a time when classical music has many economic challenges to its operation, especially in the recording business, the importance of a public service organization such as the BBC running the Proms is clear. The financial support from the BBC helps to keep ticket prices reasonable, so the concerts are available to the public who want to attend, and the BBC's continuing commitment to the season means that advanced artistic planning is possible without the many uncertainties caused by sponsorship or fundraising. This is a privilege in the 21st century and a demonstration of the most enlightened activity of public service broadcasting – that of nurturing and developing culture. In return, the BBC receives wide recognition for its role in the concerts, and a nightly vote of confidence from a live audience: an excellent bargain.

So a typical day at the Proms for a visitor to London this year might

include lunchtime chamber music at the Victoria and Albert Museum, a stroll up the road to join the Prommers queue, a pre-Prom talk at the Hall on an interesting element of this evening's programme, and then the unique atmosphere of a concert with a premiere, a rarity and a masterwork, in the marvellous circular setting of the Albert Hall which envelops its audience and draws them together with the orchestra in a uniquely involving and emotional experience. On some days there will also be a late-night concert of contemporary music, early music, or smaller-scale events. This year we have a four-hour world music marathon which will end at 2 a.m., yet another new frontier for our audience.

The response of the Proms audience is remarkable for its concentrated attention and unbuttoned enthusiasm; it is little wonder that musicians compete to return to the Proms, where they receive such a high quality of listening. The text that is traditionally sung to Elgar's *Pomp and Circumstance March No. 1* on the Last Night includes the words 'wider still and wider': they may no longer apply to the British Empire, but they do apply to the Proms as we strive to offer the very best in music-making to a worldwide audience. Join us!

Details of this year's BBC Proms including online booking: www.bbc.co.uk/proms



PROMS

18 JULY - 13 SEPTEMBER 2003



© BBC

Ageing

Bert Steinkamp

*Former Programme Director,
Radio Netherlands*

What is the impact of an ageing society on radio?

In many European countries, the composition of society has changed considerably over the past century. A full generation has been added. Life expectancy has increased dramatically, and the new generation of seniors is healthier, more affluent, more mobile and more mentally agile than ever before.

Such demographic changes are perfectly foreseeable, yet politicians do not always sufficiently heed the signals, e.g. about the effect of the post-1945 baby-boom generation reaching retirement age.

All the same, the effects of such changes are now with us or at our doorsteps. Over the coming decades, the over-50 age group will increase by some 70%, the under-50 group by less than 3%. This will considerably tilt the demographic balance in any society. One of the professional spheres picking up the signals is the advertising world. They are beginning to detect that some of their thumb rules about seniors no longer apply. In the past, it was assumed that the over-50s are brand-

faithful, will never change their purchasing habits and, consequently, there was no point in spending any advertising budget on this target group. Some of the larger advertising firms are already changing their ways and accordingly splitting the over-50s, usually into three sub-groups, with demarcation lines at the ages of 60 and 75.

Decrepit

Following the ‘European Year of the Elderly’ in 1993, studies have been undertaken in a fair number of countries to prepare for action by governments and NGOs alike in order to come to terms with a society in which the notion of ‘old’ no longer equals ‘infirm’ or ‘decrepit’. ‘Elderly’ has become an un-PC [-politically correct] term.

In countries like Austria, Belgium, Finland, France, Germany, Ireland, Italy, the Netherlands, Portugal, Sweden and the United Kingdom, research has also involved the media. There are two reasons for this: to establish what impact the ageing of

society will or may have on media content and presentation, and to try and rectify the sometimes derogatory portrayals of older people in the media.

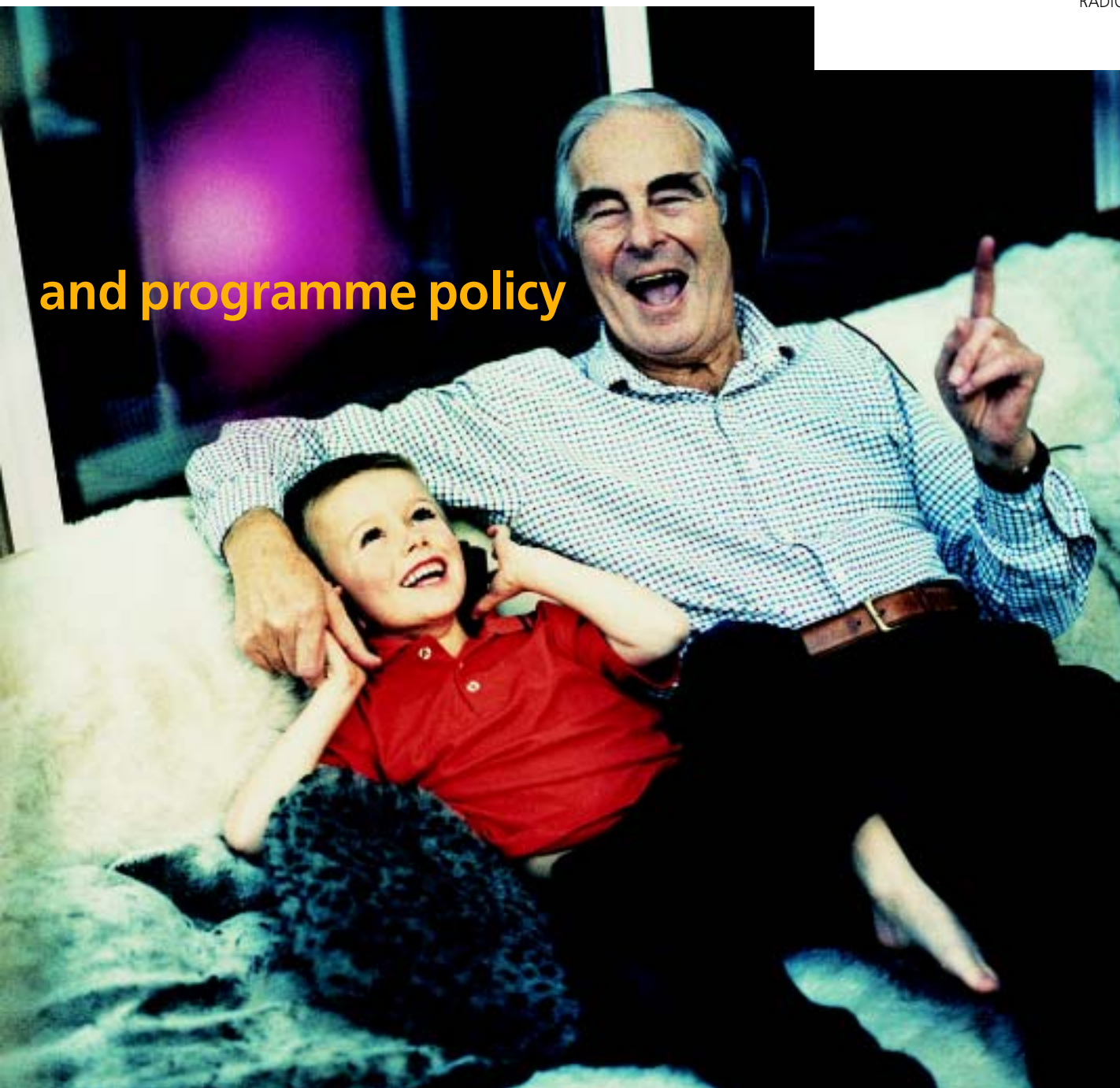
This leads to questions on ‘benchmarking’ and ‘good practice’. In the United Kingdom, the first steps have also been taken in applying the new balance in demography to personnel policy, e.g. by deliberately involving more over-40s professionals in production and presentation.

In other countries, professional broadcasters have engaged in discussions of a rather fascinating aspect: does one or does one not introduce more programmes specifically for older people? Doing so might build up a stronger link with the audience but have the negative effect of ‘ghetto programming’. Another danger is that it might lead, in extreme cases, to social exclusion. A different facet of this question is: “Why are the media bending over backwards to provide programmes for the under-25s but not for the over-50s?”

Projects and tools

National governments and the European Commission have been

and programme policy



helpful in subsidizing some of these projects. A recent example is a subsidy from Brussels for the three-year project Media and Diversity. It involves professionals from a number of EBU Members and provides tools to help others deal with the future.

From a more personal standpoint, as a former programme director, I have been involved in the organization of some of this international work. It has struck me more than once that a beautifully round wheel is being invented all over again. I have been concerned that, lacking proper European coordination, such

re-invention might be repeated elsewhere, and I wonder why in such activities at European level which are for the benefit of the media, and broadcasting in particular, there is no connection with that European cooperative instrument *par excellence*, the EBU.

This sentiment increased once it became clear that one of the first results would be a toolkit for programme trainers. A next step in the project will be organized by a number of broadcast trainers from various EBU Member organizations. There is, obviously, not the slightest doubt about the quality of their

work. But what strikes me is this: on what basis will current and future programme directors free up staff time for training on the specific topic of *the ageing of society and its consequences for programme planning and presentation?*

Everybody knows the answer to that one: the only viable basis will be that of conviction. If the EBU Radio Department shares this conviction and has a positive reaction, current and future projects in this sphere – whoever finances them – can count on a coordinated approach by the appropriate European professional body.

EuroNews

2002 was a major step for EuroNews in terms of increased audience share in Europe.

Following its launch in Russia in September 2001 and in Spain on the satellite bouquet Via Digital in October 2002 (800,000 new subscribers), EuroNews also developed in new markets: the Federal Republic of Yugoslavia in September 2002, Macedonia (FYR) in March 2002 and on cable in the Czech Republic.

In Europe, 3.9 million viewers watch EuroNews daily either on cable or satellite. Another 2.1 million look at the channel via terrestrial windows on national European channels.

EuroNews is now the most watched pan-European news channel in Europe. On cable and satellite EuroNews is significantly ahead of the other pan-European news channels: EuroNews is watched twice as much as CNN (1.9m) and three times bigger than BBC World (1.2m).

In one year, EuroNews has increased its distribution by 24%. Today, EuroNews is received in 137 million households making it the most distributed news channel in Europe.

Russia

After launching on 17 September 2001, EuroNews has become a major channel in the Russian audiovisual landscape. It is the first rolling news channel in Russian and the first news foreign channel to broadcast terrestrially in Russia.

Initially available on cable networks and the Russian satellite bouquet, EuroNews is now broadcast, via Kultura TV, on the terrestrial network in Moscow and its surrounding area.

Sixteen months later, on 10 February 2003, EuroNews is now broadcast on the entire terrestrial network in Russia via RTR's regional channels in 89 regions. The channel reaches 27 million households, bringing EuroNews terrestrial coverage of Russia to more than 50%.

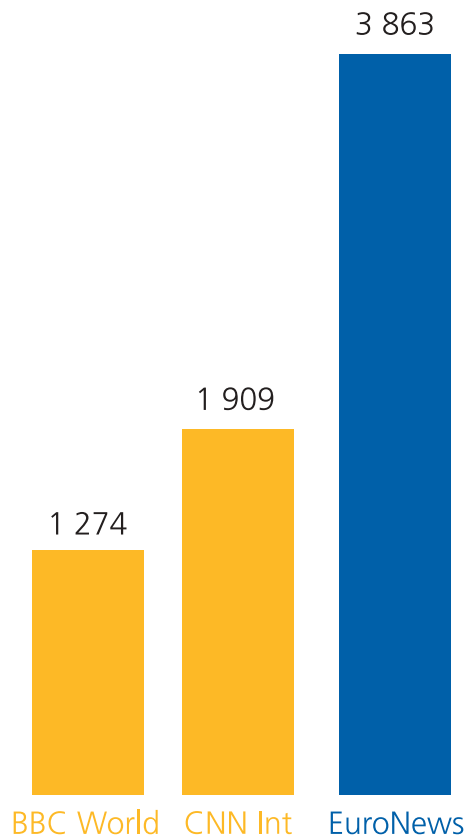
The latest peplemeter data published by Taylor Nelson Sofres Gallup media positions the channel among the major channels in Moscow: on an average day, 520,000

developments

TELEVISION

News





Daily Reach in Europe – Cable & Satellite – Q4 2002* (in thousands)

* Peplemeters data. Source: Eureka. Based on peplemeter data from AGF/GfK, Germany; Sofres, Spain; MédiaCabSat, France; AGB Polska, Poland; Telecontrol, Switzerland; and CIM, Belgium.

viewers in Moscow watch EuroNews’ programmes meaning a daily reach of 7.5 %, an exceptional result for a news channel. EuroNews is broadcast on Kultura TV between 7 a.m. and 10 a.m. and from 1 a.m. to 3 a.m. (local time). EuroNews audience data are published every week on <http://www.gallupmedia.ru/> (English and Russian website).

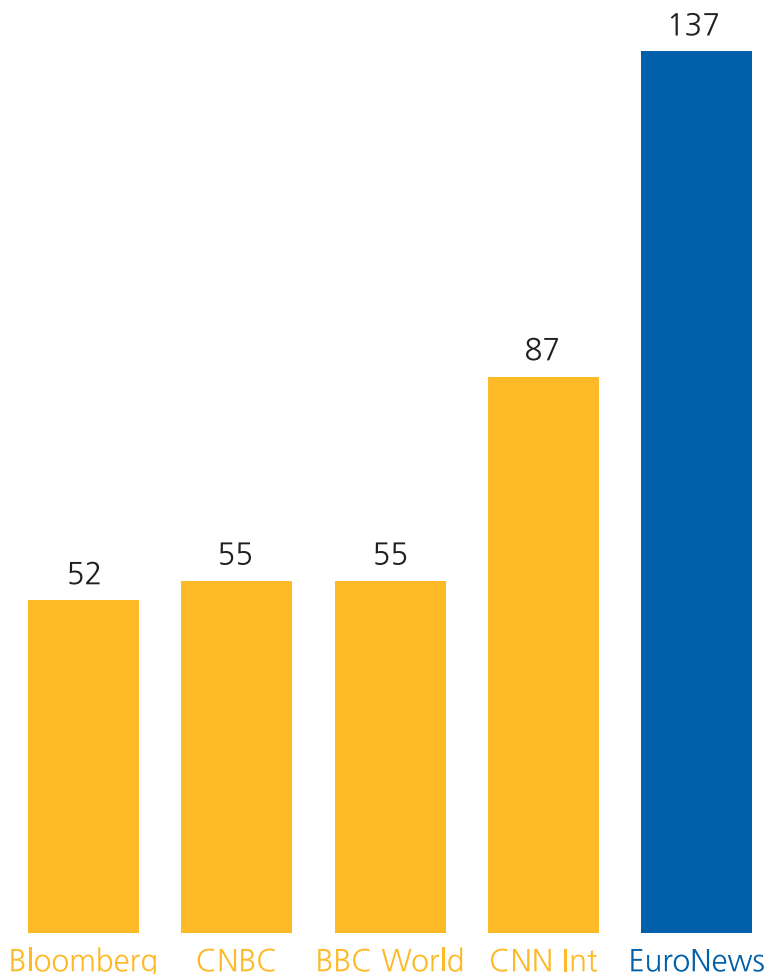
France

According to MédiaCabSat, EuroNews has strengthened its position as the second most watched news channel in France in terms of both audience share and cumulative daily reach. EuroNews is the only channel to increase its audience share, with its competitors recording decreases or remaining stable.*

Of all 79 channels measured, EuroNews is the sixth most watched cable/satellite channel by the ABC1 population with a daily audience that has increased by 20%.

In France, EuroNews competes with two national news channels: LCI and I-télévision. The other international news channels don’t subscribe to the French audience survey.

The leading French digital satellite platform adds EuroNews’ Russian version to its basic offer, Canal-Satellite Thématiques. More than 2 million homes will receive a channel in Russian for the first time.



Europe: pan-European news channels distribution. PETV Report Q4 2002 + EuroNews 01.2003 (in million)

Finland

Thanks to EuroNews’ wide range of languages, a Finnish cable operator has been able to place the channel in three separate bouquets.

Finnish subscribers receive EuroNews in digital and in all seven language versions. Suomen 3KTV Ltd – a consortium of 18 Finnish cable operators – has launched EuroNews in three different digital packages – “terra.tv”, a bouquet made

up of foreign-language channels; “loisto.tv”, a documentary and lifestyle bouquet ; “russia.tv”, a selection of programmes from Russia.

Portugal

EuroNews and RTP have concluded the renewal of their 1999 agreement to pursue their cooperation and continue with the production of EuroNews’ Portuguese language version. This agreement secures terrestrial broadcast on the RTP channels of EuroNews’ Portuguese service in more than 3 million Portuguese homes.

Belgium

For the first time, EuroNews subscribes to CIM Belgium. The Belgian TV market is particularly clustered and competition is strong. EuroNews enjoys a strong position in the country with a daily reach of 370,000** viewers (December 2002). EuroNews is the leading pan-European television news channel; its audience is twice that of CNN International (150,000 daily viewers) and four times more than BBC World (76,000).**

EuroNews is broadcast in French on the main cable networks in French-speaking Belgium and the Brussels region, reaching 1.5 million homes. The multilinguism of EuroNews is well adapted to Belgium. In the Brussels region, viewers also receive EuroNews in English and German. Near the German border it is also broadcast in French and German.

Armenia

In March 2003, EuroNews was launched in Armenia. The Russian language version is broadcast terrestrially 14 hours a day by the new Armenian news channel ArmNews TV and reaches 1.5 million viewers. The launch has been enthusiastically welcomed by viewers and Armenian officials who

have been establishing ties with European countries since the country’s independence.

Greece

In 2003, EuroNews was also launched in Greece on the digital satellite platform Nova.

and worldwide...

In April 2002, EuroNews concluded an agreement with the New York cable operator Cablevision Systems Corp. followed in June 2002 by an agreement with the Canadian cable operators Vidéotron and COGECO. In spring 2003, the satellite bouquet Bell Express Vu will offer EuroNews to its Canadian subscribers.

Thanks to the latest distribution developments, EuroNews is now available in more than 145 million households all over the world.

* *MédiaCabSat is an audience research tool for cable and satellite channels. The study was conducted by Médiamétrie from 2 September 2002 to 16 February 2003. The sample size was: 1,015 cable & satellite households (3,100 viewers), representing 12,508,000 subscribers to cable networks and digital platforms.*

Target: 4+, 15+ and ABC1

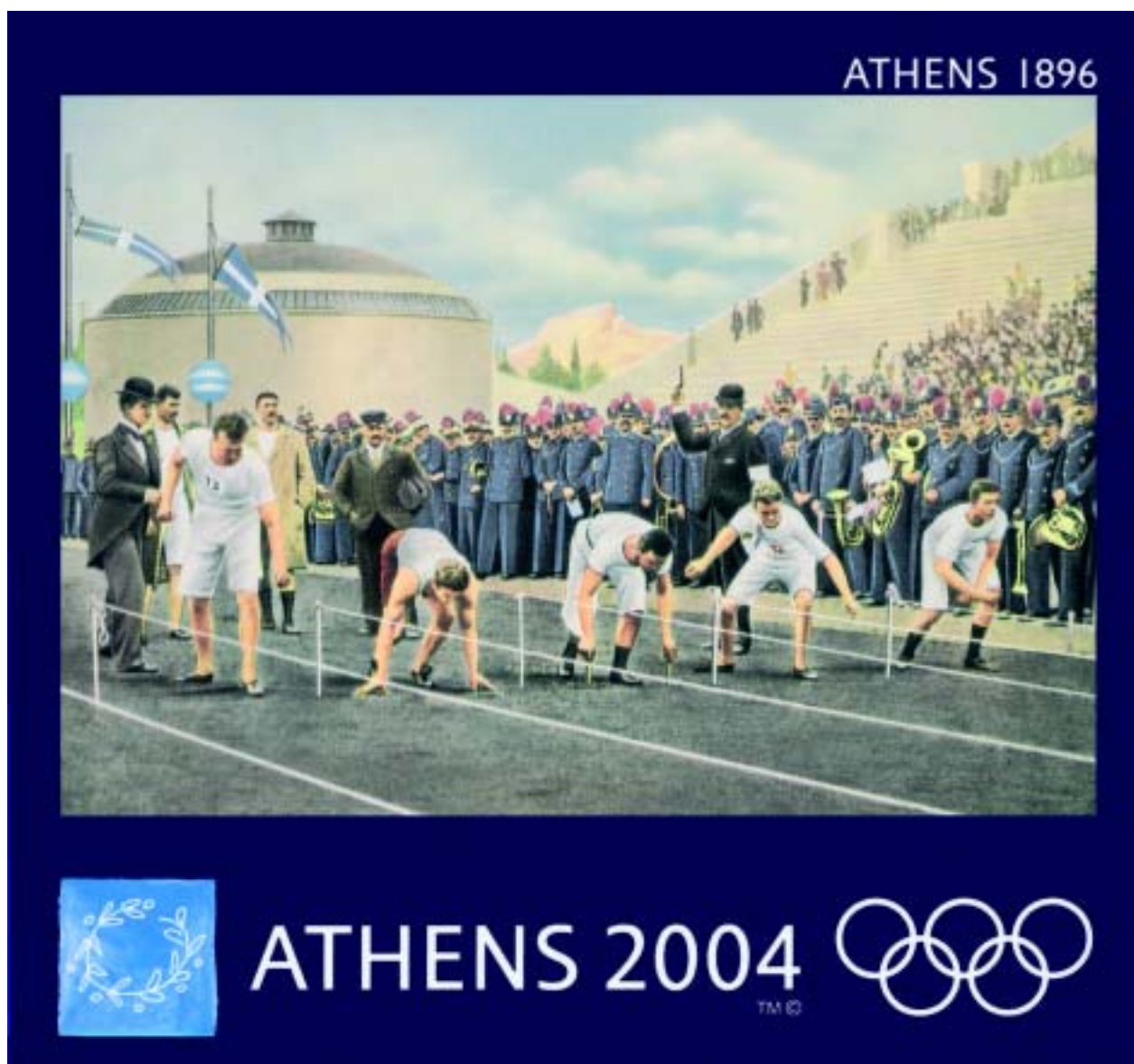
** *CIM Belgium, North and South Belgium – Adults 15+ - 1 minute).*

EuroNews has 19 public service broadcaster shareholders:

CT (Czech Republic), **CyBC** (Cyprus), **ENTV** (Algeria), **ERT** (Greece), **ERTT** (Tunisia), **ERTV** (Egypt), **France Télévisions** (France), **PBS** (Malta), **RAI** (Italy), **RTBF** (Belgium), **RTE** (Ireland), **RTP** (Portugal), **RTR** (Russia), **RTVE** (Spain), **RTVSLO** (Slovenia), **SRG SSR idée suisse** (Switzerland), **TMC** (Monaco), **TVR** (Romania), **YLE** (Finland).

Sports

Arthur Haechler
*Chairman,
EBU Sports Group*



rights

perspectives

Mission impossible?

To present the European and EBU situation in the field of sports rights is a difficult one, almost a 'mission impossible' as EBU Members have their own philosophies, markets, financial backgrounds, etc.

And speaking on global perspectives is even more of a 'mission impossible', especially when 2002 was an eventful year with so many global players leaving the field of sports rights.

Comfortable past

We do not have to go all the way back to the ancient Olympic Games of Greece but a quick glance at the situation 30 to 40 years ago is essential to understand the present situation.

It was a time when we all had contract exclusivities: nobody else was then around in the field of electronic media. It was also a time when we had money – not the large sums of today but the kind of money we needed.

It was a time when we were willing to devote airtime to the big world of sports. Hours and hours of direct

transmissions throughout the whole of Europe were enjoyed by our viewers, the athletes, the sport federations and sport bodies. And the viewers honoured our efforts. Everybody was happy.

All of a sudden we had to face stiff competition from commercial broadcasters which was new and unknown to us. Therefore in the 1980s a new era in European television started. The competition had different goals than public broadcasters: to make money for their shareholders was their only reason for existing.

They were free in their programme philosophy. They could be very selective, chose the most promising fields of play and they committed themselves – also their impressive financial potential – to very few sports, notably football, tennis and Formula 1, and they were able to outbid the public broadcasters. We call this cherry picking!

Whereas we, public service broadcasters, embraced our old, traditional formats and traditional financial contributions. And – mainly – we continued to be general

broadcasters. We still tried to sign as many contracts as we possibly could get – throughout the whole range of sports. We continued to do our television sport productions using the latest technological standards and we faithfully proceeded with extended live broadcasts, even of so-called minor sports.

Admittedly, these were difficult times for public broadcasters, broadcasters voluntarily united in a union which had always handled their sports rights.

We lost contracts and sports that were dear to all of us (World Football Cup, Wimbledon, Formula 1, to mention a few). At least, we lost them for a while and in some territories.

There were rightsholders that came back to the public broadcasters, be it even for less money, begging to put their sport back on our screens, because it was no longer seen on European television. (Wimbledon even knocked at little SRG's door.)

Overall, I do think that public broadcasters managed these times quite well – depending of course upon the markets. This is mainly thanks to their efforts in the fields

of airtime, production quality and, of course, financial contributions. But it is also thanks to the foresight of some sport leaders who not only took the short-term financial aspects into consideration, but rather had a clear idea of the TV value for their sport. Long-term commitment on both sides pays.

Challenges

Is there a lesson to be learned from the stormy years of the 1980s and 1990s?

The EBU has had to learn to adapt to changing times. It has to be prepared for the changing world of sport rights acquisitions. We are forced to move faster, act and react quicker. These are qualities that are not always easy for the EBU to incorporate: we do not have an EBU 'dictator', every decision is based on consensus and mutual agreement.

The disadvantages of such a system are evident today.

To negotiate sport contracts for a union the size of the EBU is one of the most challenging jobs. Today, offers are extremely difficult – almost impossible – for the Union to put together and present them sequentially to a sports federation. The interests of Members vary more than ever as does their financial commitment and airtime guarantee. Needless to say, an offer that fits the intentions and purposes of only one individual broadcaster is easier to place and is more likely to be successful.

There is also less common ground among EBU Members than ever before. Their wishes and demands were reviewed and also discussed at length in various special interest groups at the Sports Group meeting in Portugal.

The result was clear: Members want customized contracts, no big packages; they want essentials with no 'extras' that create a big production burden. In athletics for instance: 'yes' to the outdoor world championships, but 'no' to the half-marathon world championships!

For the past two years the EBU has reflected deeply on its 'philosophy' of acquiring sports rights.

The EBU President saw this as one of his very top priorities and set up a working group to study this. At the 2002 EBU General Assembly, Members agreed to the proposals for a new sports rights acquisition policy – an instrument that was unknown years ago and was probably not necessary at a time when a handshake was almost good enough. Today such a tool is more than necessary.



The crucial aspect of this new policy is that in a highly competitive market, the joint acquisition of sports rights can function only if all Members interested in a given contract comply with the procedural rules and, in particular, make realistic and honest financial offers, rather than relying on other Members' high offers to secure the rights.

The philosophy stands – now comes the even more difficult and more challenging part: the Members and the EBU Permanent Services have to live and act accordingly.

It is essential if we want to succeed and survive that we focus on our strengths and live by these principles. But we have to be flexible, original, imaginative and open to new formats, without giving up our true identity, our true selves.

We – the public broadcasters – have qualities that no agent or rights dealer can offer (we are reliable partners – in good times and bad times) and that no sports federation or sports body can do without:

- we have a channel – free-to-air;
- we have airtime;
- we have production facilities;
- we have excellent production know-how.

All of this is invaluable – unique to us broadcasters – but all of these unique qualities have to be mentioned at the right time and to the right people and used in the right situation. Judging from first responses, we have good reasons to believe that this road will lead us to success.

If we – the public broadcasters – do not make full use of the above and also make fair financial offers then I

am afraid that the options are few and not too attractive:

- we will lose more ground and more sport contracts – contracts that are essential and valuable to us. We therefore will not be in a position to satisfy our customers;
- or – in already financially tight times – we will have to pay more, much more, because we will be forced to go through third parties. Do we really want this?

I cannot guarantee that this alone and by itself secures and grants us sports rights – but I can guarantee you this: if we do not use our very own and excellent tools, we will end up with no major sports in our rights portfolio.



Media

Interview with Jean-Marie Leblanc
Director, Tour de France

The 2002 Tour de France was one of the most comprehensively reported by the media.

Some 1,200 journalists and 1,000 technicians covered the 3,277.5 km race.

Seventy-five television channels aired video footage to 170 countries.

Seventy national and local radios were accredited.

In the framework of its contract with ASO/STF (Amaury Sport Organisation / Société du Tour de France), valid until 2004, the EBU worked for Members in Belgium (RTBF and VRT), Switzerland (SSR SRG idée suisse), Germany (ARD, ZDF), Denmark (DR), Spain (RTVE) and the United Kingdom (Channel 4).

Furthermore, TV5, CLT (Luxembourg), RTP (Portugal), TV 7 (Russia), Slovene television as well as Lithuanian television (the latter for the last stage only) also used EBU services – with some restrictions – to cover the Tour.

France Télévisions broadcast 117 hours of programmes, 75 of which were live. These were watched by 3.5 million viewers on average every day, accounting for a 44% audience share with peaks of 75% for finishes.



a feat



1903 – 2003

DIFFUSION EBU – 2003/1



Patrick Jaquin: When did Tour de France coverage switch from radio to television?

Jean-Marie Leblanc: First of all, there never was a switch from one to the other. Television arrived on the scene as a complement to radio, in the same way as radio came to add its coverage to the written press that founded the Tour de France.

It was Pierre Sabbagh of ORTF who first introduced television coverage of the Tour de France route in 1952. Since then, live coverage has considerably developed, with the Tour becoming, for television as a broadcasting medium, a fantastic testing ground enabling it to improve its broadcasting techniques.

For many years there was a sort of exchange between the event enjoying better and better coverage, and the television which benefited from the opportunity to give its technicians a free range to achieve a broadcast quality that could then be transposed to other events around the world.

What was positive about it?

It enabled thousands of viewers to follow the exploits of cyclists who up until then had only been





described by radio commentators and newspaper journalists.

It enabled the Tour de France to easily cross its national borders and find an audience in, currently, 170 countries, providing in addition to the sports event itself, a marvellous showcase for France and its scenery. In this way it increased the number of Tour fans, adding to its sports audience a more general audience interested in the changes in scenery and the architectural heritage along the route.

And through the rights television now pays to sports federations – and the Tour is no exception – it has contributed to the financial well-being of sports. Its contribution represents about 40% of the budget of an event that has no income from ticket sales, as the Tour is and should remain a free event accessible to everyone.

What is negative about it?

From the point of view of its narration of the event, nothing.

As regards logistics and organization on site, there are a few constraints: the arrival zones for the Tour de France must now have an area of at least 3,000 m² to provide parking

facilities for about 150 OB vans working for 75 channels.

These space constraints must obviously not influence the choice of arrival zones, in particular when it comes to Mont Ventoux or Alpe d'Huez.

The organizers, in permanent consultation with the television crews, define well in advance the rules for installing the technical facilities needed to provide a quality international signal.

Do you think of television requirements when preparing the route?

Of course, but like any event organizer we make sure that the sport itself maintains priority.

For example, we have set the arrival times at about 17:30 as we believe this is the latest acceptable time for those taking part in the Tour and first and foremost the racers who need to get back to their hotels to rest, have their massage and a meal.

If the hotels are too far away, which is the case when we are crossing the mountains, the arrival time is brought forward to 16:00, because the needs of the racers must come before anything else. 17:30 is also a cut-off time for the written press which have to report on the races for more than 400 publications with hundreds of millions of readers. Finally, we keep in mind that the rest days must not fall on a Sunday or on 14 July when the potential audience ratings are the greatest.



BBC Sport's vision is to be
THE UK's sports broadcaster.

To achieve this, we aim to bring major sports events to the UK audience. My remit is to promote and market all of the BBC's sports output whether it be on television, radio or online.

We look to follow the UK's national teams and heroes and bring the excitement of sport to all of our audiences. To achieve this we want to bring sport to the widest possible audiences and use all aspects of the BBC to do this. We want to develop sports-related programming and we are committed to evolving and improving our core coverage of sporting events.

We believe that the key to BBC Sport is that we offer the things that really matter in sport. Also, we strive to be credible and incisive as well as being inclusive and emotive. In addition we are constantly looking to be innovative and imaginative in all of our output.

Being a part of the BBC gives us many unique advantages and platforms for reaching different

Wimbledon

Guy North
Head of Marketing, BBC Sport

audiences. Through BBC ONE and BBC TWO we can reach 90% of the population and this is supplemented by eight digital television channels, as well as national and regional services. BBC radio, despite the fierce competition from commercial stations continues to enjoy over 50% market share. The diversity of networks enables us to target very different audiences: Radio 1 reaches more 15–24-year-olds than any other station; Radio 2 is the most listened to station in the UK; and Radio 5 Live is the most listened to sports station in the UK. In BBC Online and the new interactive television services we also now have access to cutting-edge technology for our sports output.

To make the very most of all of these services from a marketing perspective we look to build on the core coverage of key sporting events by introducing more pre-event build-ups and more post-event analysis. Then beyond that we will look for related programming that will help promote the coverage of the sporting event. This could be as simple as Tim

Henman appearing as a guest on *Parkinson* in the run up to Wimbledon or as complicated as a BBC TWO documentary series about how the bodies of athletes work. We are constantly on the look out for all potential opportunities to promote our sports coverage.

75 years

Wimbledon and the BBC have a very special relationship and recently celebrated a partnership that has lasted so far for 75 years. Between us we look to not only captivate the whole of the UK every summer but also provide pictures to over 200 countries around the world as well. Much of the success of this relationship has been down to our evolving coverage and introduction of new technology. This has now reached unprecedented levels and is genuinely multimedia.

On television there is extensive live coverage across BBC ONE and TWO. BBC TWO also takes a nightly highlights programme, plus there are regular updates in news

bulletins. We have a panel of unrivalled experts and commentators, who last year included Sue Barker, John McEnroe, Boris Becker and Chris Evert.

Our digital interactive service allows digital satellite viewers to choose which match they want to watch from five being offered, while digital terrestrial and cable viewers can enjoy a full and interactive text service. This interactive service has been a real breakthrough in our coverage and by actually offering viewers a choice of matches, it is really adding value to the viewing experience rather than being just a gimmick. Radio 5 Live provides extensive radio coverage throughout the tournament and ensures that the listener really feels that they are with the commentators at courtside. BBC Sport online features a dedicated Wimbledon site that is first for news and views, as well as offering fun and games.

So if that is what we basically had to offer, what were our marketing objectives in 2002? First and

Wimbledon

foremost, to increase viewing, listening and usage of all of our Wimbledon services. Secondly, to ensure that the BBC got maximum credit for its extensive coverage of Wimbledon, and finally to reinforce BBC Sport's position as the home for major sporting events.

Our marketing campaign was not targeted at tennis fans because they will obviously come to our coverage anyway. Our target audience was a much broader group of people who we call 'main eventers'. These are people who will watch the big sporting events but are not necessarily big sports fans. They will enjoy the whole Wimbledon atmosphere and love the chance to shout for a British player.

The strategy behind the whole marketing campaign for Wimbledon 2002 was to use all the different tools at our disposal to reach this target audience in a variety of different ways via television, radio, online and the press.

With such a diverse campaign comprising so many different elements, it was critical that there was one core creative idea that was consistent across all elements of the campaign. This enabled us to produce a cohesive and fully integrated campaign with a big impact. That core idea was – John McEnroe on Wimbledon: no one hits harder.

Why John McEnroe? Well he is one of our key faces of Wimbledon and embodies many of the values that we are looking to portray for BBC Sport. He also has a long association with Wimbledon and love him or hate him he always elicits a response out of people. So for us he was the perfect choice.

In total there were four trails that ran across BBC ONE and TWO and the digital channels. By targeting junctions around key programmes, such as *Eastenders* and *A Question of Sport*, in total the trails reached 88% of the UK's adult population, with 70% seeing a trail three or more times.

There was a series of three complementary radio trails that ran across the core network stations, reaching 51% of all adults on average over four times. In addition there were appointments to listen trails on Radio Five Live only and verbal mentions within sports desks across Radio 1, Radio 2, Radio 4, Radio 5 Live and local radio.

Throughout the sports output during the tournament, pointers were made to the Wimbledon coverage on television, radio and online, and in addition special mentions of the interactive service and how to use it were made whenever possible. Banners promoting BBC Sport's Wimbledon coverage were sited on high-volume traffic sites across BBC Sport online and users were given the chance to download a screen-saver.

During every morning of the tournament *Breakfast News* ran a 30-minute magazine-type preview show for Wimbledon, hosted by Gaby Roslin, which discussed issues, off-court antics and the up-and-coming matches of the day. Children's BBC also ran features in a number of their flagship programmes, including *Blue Peter*. Both of these initiatives helped to reach non-sports specific audiences and helped broaden the appeal of Wimbledon.

In terms of other marketing activity we promoted the interactive service

through all of the digital platforms on which it was running. We also had a demonstration of the interactive service at Wimbledon itself for those lucky enough to be at the tournament. And finally, Radio Five Live listeners were given the chance to win a ‘money can’t buy’ complete Wimbledon experience of an on-air competition, including a behind the scenes tour, a coaching session and Centre Court tickets.

To help promote tennis, and Wimbledon in particular, to children BBC Sport, the AELTC (All England Lawn Tennis and Croquet Club) and the LTA (Lawn Tennis Association) teamed up to run a mini-tennis tournament across the country that culminated in the winners being presented with their prizes at Wimbledon during the Championships. This really highlighted BBC Sport’s desire to promote tennis at its grassroots and encourage youngsters to participate in the sport.

To generate non-paid for publicity in the press we organized interviews for some of our key presenters – most notably Sue Barker and John McEnroe – and behind the scenes access for the press with the BBC Sport production effort. We also ran a competition to find a ‘mini McEnroe’ who had the chance to join John McEnroe in the commentary box and then commentate online on a game.

In terms of performance versus our objectives, the campaign must be deemed a big success. Not only did the trails score very highly in terms of prompted and unprompted awareness, but they helped to ensure that at least two-thirds of the population watched at least 15

minutes of Wimbledon on television – some 35 million viewers. Throughout the tournament Wimbledon on BBC television averaged over 20% share. The most watched match was Henman versus Kratochvil which peaked at over 13 million viewers. Over 4 million digital viewers used the interactive service, while the Wimbledon site accounted for 40% of the BBC Sport online traffic during the Championships averaging over 2 million pages printed out per day.

So, from what was a very successful marketing campaign for Wimbledon in 2002, what key points did we learn and what worked for us? Firstly, we went out of our way to ensure that we exploited all avenues of promotion, including looking for any new and innovative ways. Using key celebrities or talent definitely pulls in an audience and in particular if they are at the heart of the core idea that underpins the whole campaign. This focus on a single core idea is also very important in ensuring a cohesive campaign. To target specific audiences it is worth using different types of media, so that no one is left without seeing or hearing a promotional message. Making your brand synonymous with such a top sporting event can really bring great credit back to the brand overall and the whole BBC, as well as BBC Sport, can definitely benefit from our close association with Wimbledon.

Just how much better could it all be if only we could produce a British winner . . . Oh well, we can but dream!!

Sport and television

Interview with Frédéric Jouve

Head of Sponsoring and Special Advertising, France Télévisions Publicité



Patrick Jaquin: When we talk of sport and television, we think mainly of football, the Olympics, Roland Garros, and other major events. What about the 'minor sports', and how can we improve working relationships with sports promoters in order to give sport better exposure on television?

Frédéric Jouve: Well, what do we call a 'minor sport'? In some countries it can mean broadcast coverage of handball or volleyball, but in others it can also be a rugby match, certain tennis tournaments, or certain cycling classics. In concrete terms, what distinguishes a minor sport from a major sport is not so much the discipline itself but the event that a team or player can create, with all the attendant drama: it should be like a work of fiction with a plot, characters, emotions and a community-sharing that only sport can provide. If all these ingredients are present together, then you have a major event.

As regards your first question, there are different kinds of promoters or organizers. There are those with a global dimension such as FIFA or the IOC, the rights negotiators mandated by the organizations and the more institutional promoters such as the

television

federations or leagues. Working better with worldwide organizations seems to me to be an extremely difficult goal in the competitive context of the acquisition process in each country.

Working with rights negotiators is impossible since the negotiation is purely commercial; there is nothing especially constructive on a sporting level, everything is in the negotiation.

What should be done, then?

We must, absolutely, establish closer relations with the institutional promoters, such as the federations, for it is really they who hold the keys to sport. We must work more closely with them, more constructively and more creatively. The federations work in their own corner. They take example from the worldwide promoters and base their partnerships exactly on what FIFA might do. But there is a great difference between the weight of a FIFA and that of a national federation and the interests of broadcasters and federations are sometimes very difficult to reconcile.

Signing contracts with broadcasters while imposing exclusivities for certain sectors in order to protect the

federations' partners is a very tricky exercise. One partner acquiring TV sponsorship space is sufficient to block the marketing of such space. It is the broadcaster who suffers the considerable financial consequences. You mustn't kill the goose that lays the golden eggs. Above all, it must be possible to constantly attract new partners: grounds, officials, technical undertakings... while leaving openings. My message to the federations is: less protection, more competition.

Are we moving towards a solution?

In view of the current geopolitical context and the financial markets, everybody should assume their own responsibilities, but it is clear that certain sporting disciplines will not survive.

What solution to you advocate?

The federations should attract a new sector of investors in their sport, they should not stay tied up with the same advertisers for years and years, because in times of economic crisis they will be prisoners in terms of negotiations as they will not have been able to attract new brand names to the world of their sport.

A federation that earns more money is a federation that can invest more in the visual side of its sport and above all can invest more in training and in infrastructures in order to train new stars that will bring more to the sport and to television, and hence improve audience figures. And that's how television rights are increased! The sporting economy must be regenerated. This is not the case at present.



Over the past few years sports rights have shot up . . .

. . . making sport an expensive product in an open market dominated by unbridled commercial principles. These principles quickly reached the Arab world where sport, and in particular football, has long been a major social phenomenon.

The television channels which in the 1990s were able, through the ASBU, to offer their audiences a whole range of major national and international sports events were forced to admit that the excessive increase in rights had made it difficult for them to fulfil their mission.

Inflation

The arrival on the market of private satellite channels broadcasting from London and Rome, most of which based their scheduling policy on sport to attract audiences, brought about major changes in the Arab broadcasting environment, giving it a plural dimension and giving rise to fierce competition for the acquisition of sports rights that ASBU tried to contain by amending its

statutes to allow private channels to join as participating members.

International and regional sports federations and marketing companies have used this as an excuse to increase the value of sports rights in the ASBU zone. The summer Olympics illustrate this (table 1).

Another example: the African Nations Championship and the championship club finals organized by the African Football Confederation for which the ASBU held the rights until 2000 for the modest sum of USD875,000 dollars were sold to a competitor, apparently for close on USD18 million for the period up to 2008.

Competition for sports rights in the Arab region took a new slant in 1999 when ART, a private pay-TV channel, acquired the exclusive rights for the Mexican Football Confederation Cup. For the first time, television stations in Egypt and Saudi Arabia were unable to broadcast matches involving their

national teams: a big disappointment for the public and a terrible shock for the leaders of both countries!

Since then, the Arab broadcasting world has faced a new situation marked by a monopoly defended by one of the of the magnates of the private sector for whom sport is a profitable niche which ought eventually to generate substantial profits once Arab viewers have become used to the principle of pay-TV.

This monopoly led a marketing company, with the financial backing of ART, to acquire the rights for the latest World Football Cup in Korea and Japan as part of a package including other sports events.

For the first time Arab public service and private television channels, which were used to acquiring the rights for the World Football Cup through ASBU, had to negotiate with this marketing company for the rights for the 2006 World Football Cup.

Following the decision from FIFA President Sepp Blatter to grant African channels (except for South Africa) 'free' broadcasting rights for the latest World Football Cup, although, after bitter negotiations, all Arabic channels in Africa felt forced to accept to acquire the rights in

The Arab

Abdelhafidh Harguem
Director General, Arab States Broadcasting Union (ASBU)

example

exchange for the insertion of advertising (the volume of which was in some cases 2,500 minutes), many Asian channels simply chose to boycott the event.

The rightsholder also imposed very strict conditions for the signal transmission over earth networks out of fear that the signal would spill over national boundaries. This was the case for Abu Dhabi, Dubai, Bahrain, Kuwait and Yemen. Saudi television settled for broadcasting only the three matches involving its national team.

In this regard that the amount spent by the American Media Distribution Company to acquire the rights for the Arab territories far exceeded the total paid by the ASBU for the 1990, 1994 and 1998 events (table 2).

The place of sport

At this price, is sport still necessary? What is the current volume of sport broadcast? Is it on the increase? Are Arab broadcasters prepared to broadcast less expensive sports to stimulate the public's interest in them? What sports are of interest to the Arab channels?

To try to answer these questions the ASBU sent a questionnaire to all broadcasters in the region. Twelve, from both public and private sectors, replied with the following results:

According to statistics for 2002, 140 channels are run by these organizations, including 65 theme channels. Of these theme channels, six are sports channels. ART ORBIT, Nile Sport, Abu Dhabi Sport are encrypted, while Dubai Sport and Kuwait CH3 are free-to-air channels.

The distribution of sports is indicated in table 3 while table 4 shows the percentage of the schedule given over to sport.

All channels, without exception, replied that sport remains necessary

despite the increasing cost of rights. They stressed the greater importance they are granting to sport in their schedules.

In 2000 and 2001 the volume of sport has increased by between 1% and 100% in some cases, with the exception of Yemeni television which has reduced its sports coverage by 50% (table 5).

Which sport?

The increases in the cost of rights for football have led the Arab channels to refocus their schedules by varying their offer without ignoring football, an essential sport. Channels have even been dipping into the budget set aside for local productions to meet viewers' demand. This has been detrimental to creativity in many television organizations.

In the sports rights sector the price increase far exceeds the advertising revenue and the subsidies provided by the State.

Opening up to sports other than football was felt necessary by the ASBU, whose members asked it to take steps to acquire the rights for 'upcoming' sports. The ASBU has bought for its members the rights for the World Handball Cup and the African Handball Cup together with the last African Basketball Cup.

When asked which sports interested them besides football, the Arab channels mentioned the following sports, in order of importance (table 6).

ASBU's role

The spiralling increase in sports rights confirms the ASBU members' conviction that the best way to react is to adhere to the Union's fundamental principle: the collective acquisition of rights for major sports events. At the same time they accept

that this choice forces them to increase their budgets for sport.

The strategy adopted by the members since 1999 is to draw up a list of sports events of interest in Arab countries and for which the ASBU should try and acquire the rights. Each member must then pay its share even if it does not broadcast the event itself. To protect its members' interests and consolidate its standing with rightsholders the ASBU statutes provide for heavy penalties, up to permanent expulsion, for any member infringing the rules. Among these events, the summer Olympics, the Arab and Asian Football Championships and the World Handball Championship 2003 for which the ASBU acquired the rights.

Apart from this list of 'mandatory' events, the ASBU must consult its members each time it receives an offer from a rightsholder. The agreement is only signed once the broadcasters interested have all committed to paying their financial obligations towards the ASBU. This is the case, for example, for the qualifying rounds of the European Football Cup 2004 for which the ASBU acquired the rights.

Events	Amounts in US\$
Los Angeles 1984	350,000
Seoul 1988	420,000
Barcelona 1992	500,000
Atlanta 1996	3,750,000
Sydney 2000	4,500,000
Athens 2004	5,500,000
Beijing 2008	8,000,000

Table 1: Summer Olympics

Events	Amounts in US\$
Italy 1990	4,260,000
USA 1994	5,180,000
France 1998	5,680,000

Table 2: World Football Cup

	Football	Basketball	Handball	Volleyball	Tennis	Athletics	Others
Kuwait Ch3	40%	15%	20%	10%	5%	5%	5%
Orbit	50%	15%	0%	0%	5%	0%	30%
Nile Sport	30%	5%	5%	4%	6%	5%	45%
Average	40%	12%	8%	5%	5%	3%	27%

Table 3

Sudan	Algeria	Bahrain	Morocco	Tunisia	Yemen	Syria	New TV Liban	Egypt	Average
20%	5%	15%	4%	12%	10%	5%	8%	5%	9%

Table 4 (TV channels)

Kuwait	Nile Sport	Sudan	Algeria	Bahrain	Morocco	Tunisia	Syria	Egypt	Yemen
+20%	+25%	+100%	+1%	+10%	+70%	+2%	+2%	+1%	-50%

Table 5 (TV channels)

With the ASBU's mission defined in this way, its members are at liberty to negotiate the broadcasting rights for a sports event that interests them. Currently competition between pay-TV sports channels is mainly for certain national football championships (those in Italy, England, Germany and Spain). The fierce battle that the Abu Dhabi sports channel had to fight against a competitor to be able to keep broadcasting rights for the Italian "Calcio" is the best example of this.

The fight for sports rights is only just starting. The arrival of certain private operators on the market that do not spare any expense when they want the rights for various sports events has simply pushed prices up and this makes the ASBU's mission increasingly difficult and, by the same token, its members' mission too.

Arab viewers, who are accustomed to their national channels screening matches involving their national teams or their favourite clubs find it hard to accept this new state of things. The era of free-to-air viewing may well be dead for ever. While team sports such as basketball and handball are becoming popular in a number of Arab countries and are starting to be shown regularly on Arab channels, some broadcasters

are still wondering what influence the massive exposure will have on their broadcasting rights in future. Don't we always hear people saying that by screening football, television companies ended up increasing football's market value?

New approaches?

Broadcasters and international, regional and national sports federations ought to pay more attention to this crucial issue: it is important to the future of television sport and especially the future of sport itself.

The federations that manage the sports business at regional or international level will have to accept that it is in their interests to

rehabilitate the role of broadcasting unions to ensure that sport does not only become the privilege of those rich enough to afford it.

They must realize that, besides the money it can generate which is after all one of the conditions of its continued existence, sport cannot have total universal value unless it is shared by everyone.

The IOC, committed to the broadcasting unions with a long-term contract up to the Beijing Olympics, has already understood this and we are confident that this relationship will continue after 2008. We hope that FIFA will also want to start collaborating with the broadcasting unions again, as was the case up to 1998.

Sport	Number of mentions	Average
Basketball	8 out of 12	67%
Athletics	5 out of 12	42%
Handball	4 out of 12	33%
Volleyball	4 out of 12	33%
Tennis	3 out of 12	25%
Boxing	2 out of 12	17%
Swimming	2 out of 12	17%
Equestrian	2 out of 12	17%
Golf	1 out of 12	8%
Formula 1	1 out of 12	8%

Table 6: Interest besides football on Arab channels