NEO-KÖZSZOLGÁLATI STRATÉGIÁK

Tamás Pál

MTA Szociológiai Intézet

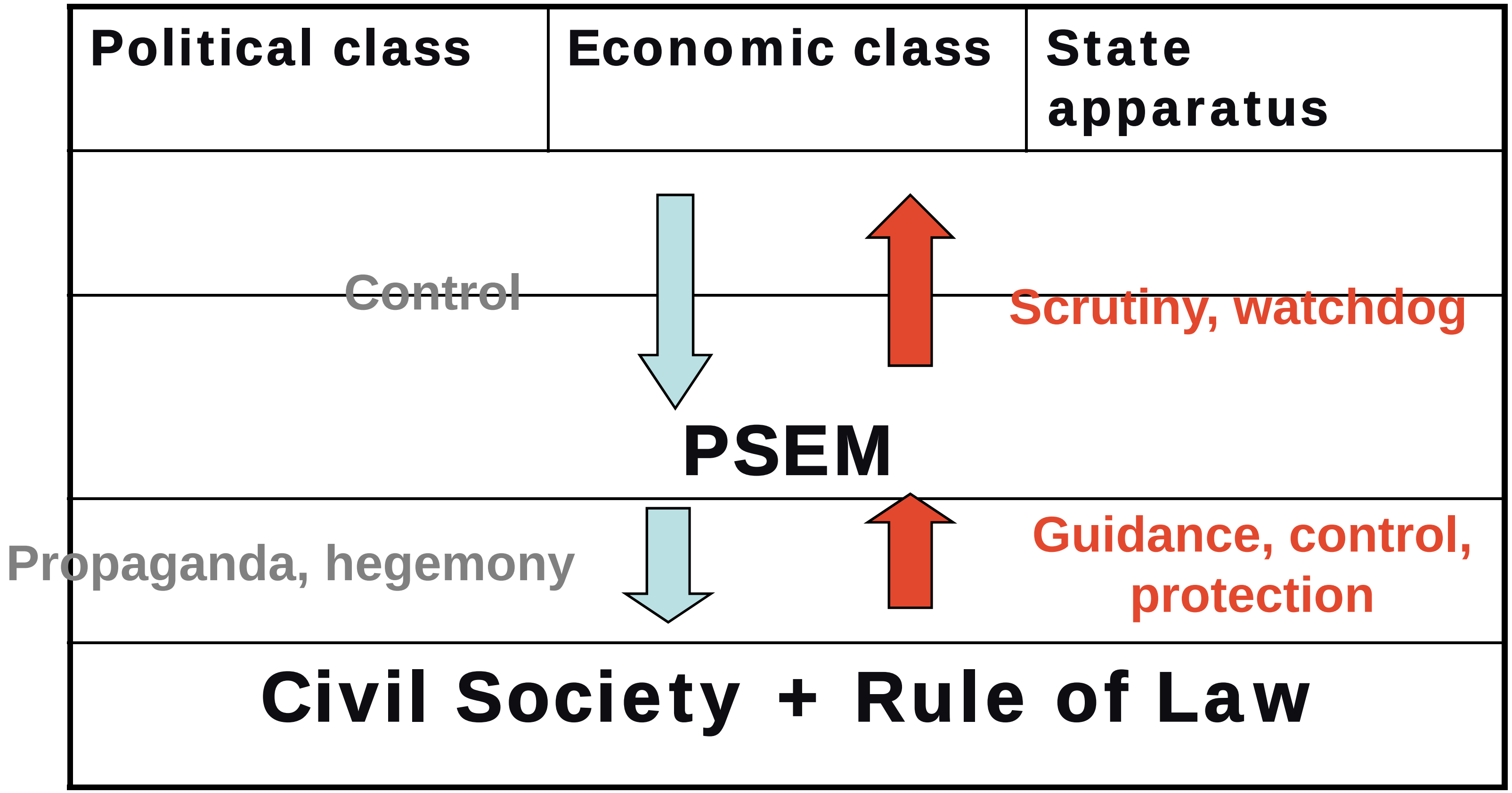
KÖZMÉDIA MEGHATÁROZÁSOK

The European Parliament (1996): "Public sector broadcasting is an aid to informed citizenship, an agency of representative pluralism bringing together different groups in society in a common conversation that shapes public opinion." "Provide unbiased and fully independent information, both in mass coverage and in-depth factual programming, capable of earning the audience's trust and of representing a reference point in the rapidly expanding information market."

The European Commission (1999): "Public service television plays an important role in the Member States of the European Community: this is true with regard to cultural and linguistic diversity, educational programming, in objectively informing public opinion, in generating pluralism and in supplying, on a free-to-air basis, quality programming."

The Council of Europe (1994): "Public service broadcasting, both radio and television, support the values underlying the political, legal and social structures of democratic societies, and in particular respect for human rights, culture and political pluralism." Or again: "Reflect the different philosophical ideas and religious beliefs in society, with the aim of strengthening mutual understanding and tolerance and promoting community relations in pluriethnic and multicultural societies."

PB in Society: Which Do We Want?



A VITA HULLÁMAI EURÓPÁBAN

a. 80as évek: verseny, a kereskedelmiek beengedése, a duális rendszer
b. 90es évek: lábon lehet e még maradni? Megfordíthatóak e még a nézettségbeli trendek?
c. 2000es évek: digitalizálás

Rendszerváltók: 90eleje:a 90esekvégétől: b+c együtt]

[1980 Európa: UK, IT duális, Lux, keres, a tobbi csak közmedia

1997 55kereskedelmi, 45 közmedia TV

A KUTATÁS ÁLLAPOTA

MEGKUTATOTT ALAPKÉRDÉS:

a. Hogyan folyik a csata a köz-és kereskedelmi médiumok között?

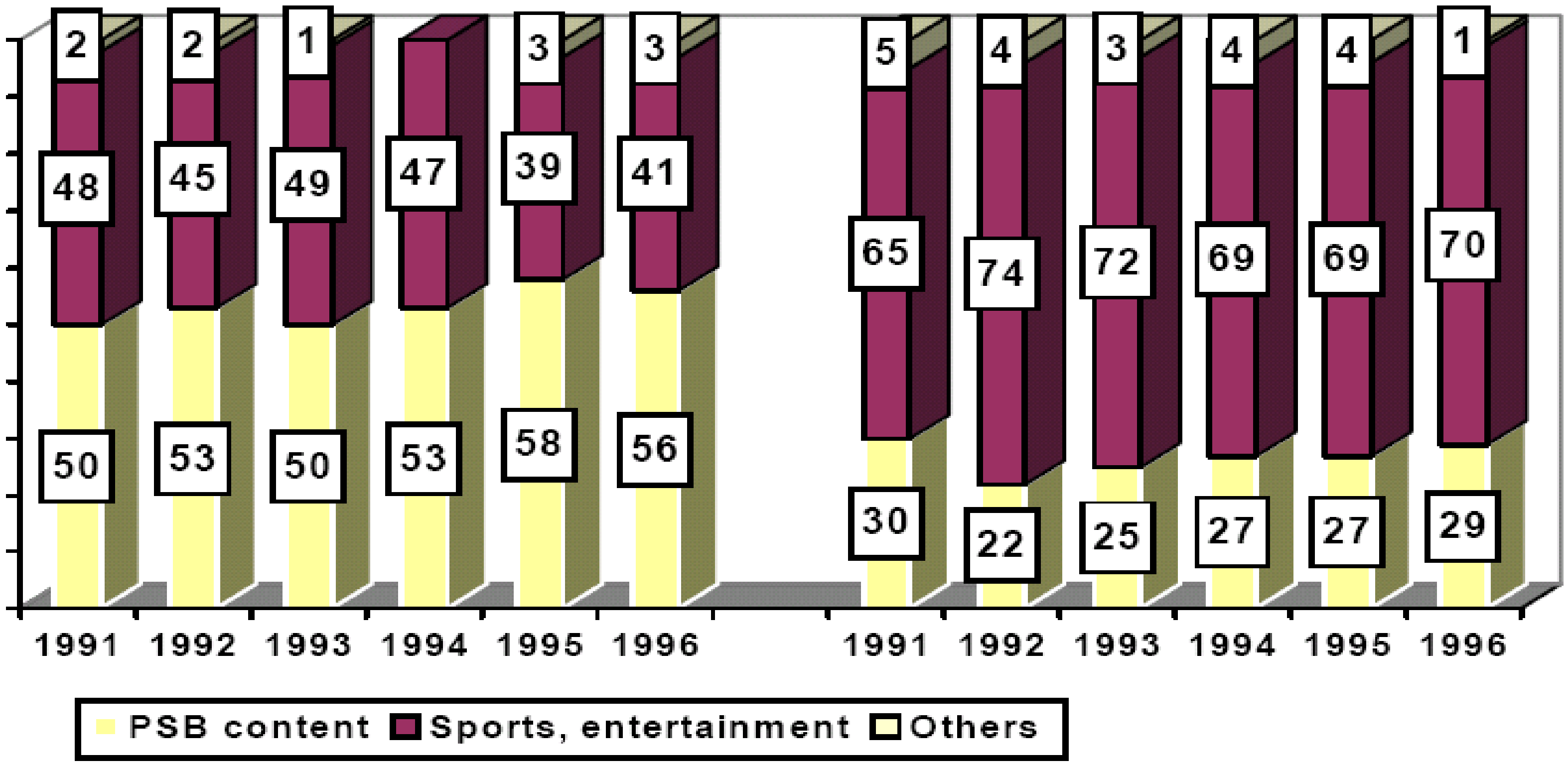
b. Hogyan hat ez a közmédiumok tartalmaira?

NEM VILÁGOS:

a. Milyenné tette a kereskedelmi a közönséget? Különösen annak politikai tudás- és igényszintjét?

KÖZMÉDIA TARTALMAK- NEMZETI SPECIFIKUMOK

Contents of SVT and RTP compared



SVT – Sweden **RTP – Portugal**

Source: „Public Service Broadcasting Around the World, McKinsey&Company, London, 1999.

AKTUÁLIS ALAPÁLLAPOTOK

- “Everyone is baking their own cookies”
- Funding depreciation
- Usage strong compared to other public service providers, not so (TV) compared to other broadcasters
- Policy support of pub’casting less assured
- Other public service entrants entering electronic media

STRATÉGIAI VESZÉLYEK I: Game Over?

- "**Semantic" strategy**: public service broadcasting should be just that; no new technologies;
- "**Clear and precise definition of the remit" strategy**: no "mission creep", i.e. no change;
- "**Harmless PSB**" strategy: redress market failure, niche broadcaster and no advertising;
- "**PSB no longer needed**" strategy: „limitless choice" is available, so no need for public intervention
- **End Result: no modernization and slow death of PSB.**

STRATÉGIAI VESZÉLYEK II ÚJ TENDENCIÁK A POSZTKOMM. MÉDIA SZBÁLYOZÁSBAN

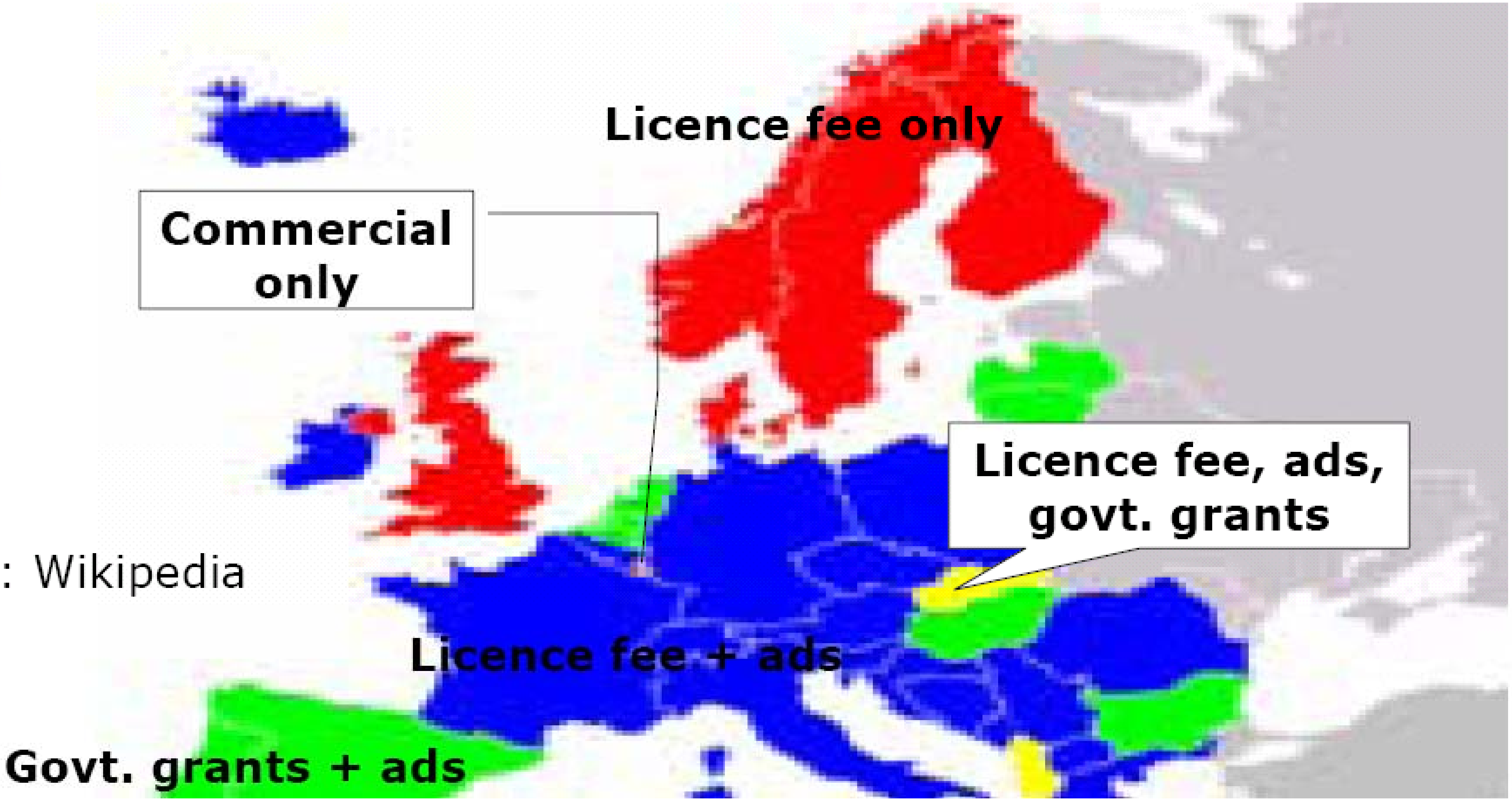
- Many post-Communist countries are changing broadcasting laws to impose strict „political parallelism” and **direct political involvement in the running of PSB organizations. Deep public cynicism and scepticism as to feasibility of the public service idea.**

- **Karol JAKUBOWICZ**

TRENDEK

A KÖZMÉDIATORTA- FINASZÍROZÁS ÉS KÖZÖNSÉG

PSM TV funding systems in Europe



ource: Wikipedia

Funding of public service broadcasting

A combination of license fee, state money and advertising

License fee (more than 50 percent):

- **U.K., France, Germany, Italy**
- **Czech Republic, Slovakia**
- **Romania**
- **Croatia, Slovenia, Macedonia**
- **Turkey**

State money (more than 50 percent):

- **Latvia, Lithuania, Estonia**
- **Hungary**
- **Serbia**
- **Albania**

Advertising (more than 50 percent):

- **Poland, U.K. (Channel 4)**

Funding of public service broadcasting

Budget of the public television stations (in per capita, in euros)

Including public radio	
Croatia	38.5
Macedonia	7.76
Serbia	7.47

Germany	85.39
U.K.	71.09
Slovenia	56.5
Italy	46.5
France	37.43
Hungary	15.13
Czech Republic	13.7
Slovakia	11.10
Poland	10.9
Estonia	9.95
Latvia	5.29
Romania	4.42
Lithuania	4.18
Turkey	3.57
Bulgaria	3.19
Albania	2.48

Source: EUMAP reports (budgets for 2003 or 2004)

Break-down of EU PSM budgets by revenue streams (2004) (EUR million)

PUBLIC INCOME	**20 212**	**67.45%**
Grants	2 334	11.54%
Licence fee	17 517	86.66%
Other	360	1.78%
COMMERCIAL INCOME	**9 103**	**30.38%**
Advertising	5 772	63.4%
Sponsoring	176	1.93%
Programme sales	547	6%
Merchandising	481	5.28%
Pay-TV	483	5.3%
Other commercial	1 664	18.27%
OTHER	**649**	**2,16%**
TOTAL	**29 963**	**100%**

Source: EAO Yearbook, 2006

Concentration of television markets

The advertising pie

- **France** (largest three channels: over 75%)
- **Italy** (Mediaset + RAI: almost 80%)
- **Germany** (RTL+SAT.1, ProSieben: around 70%)
- Slovakia (Markiza TV: 76%)
- Czech Republic (TV Nova: 66%)

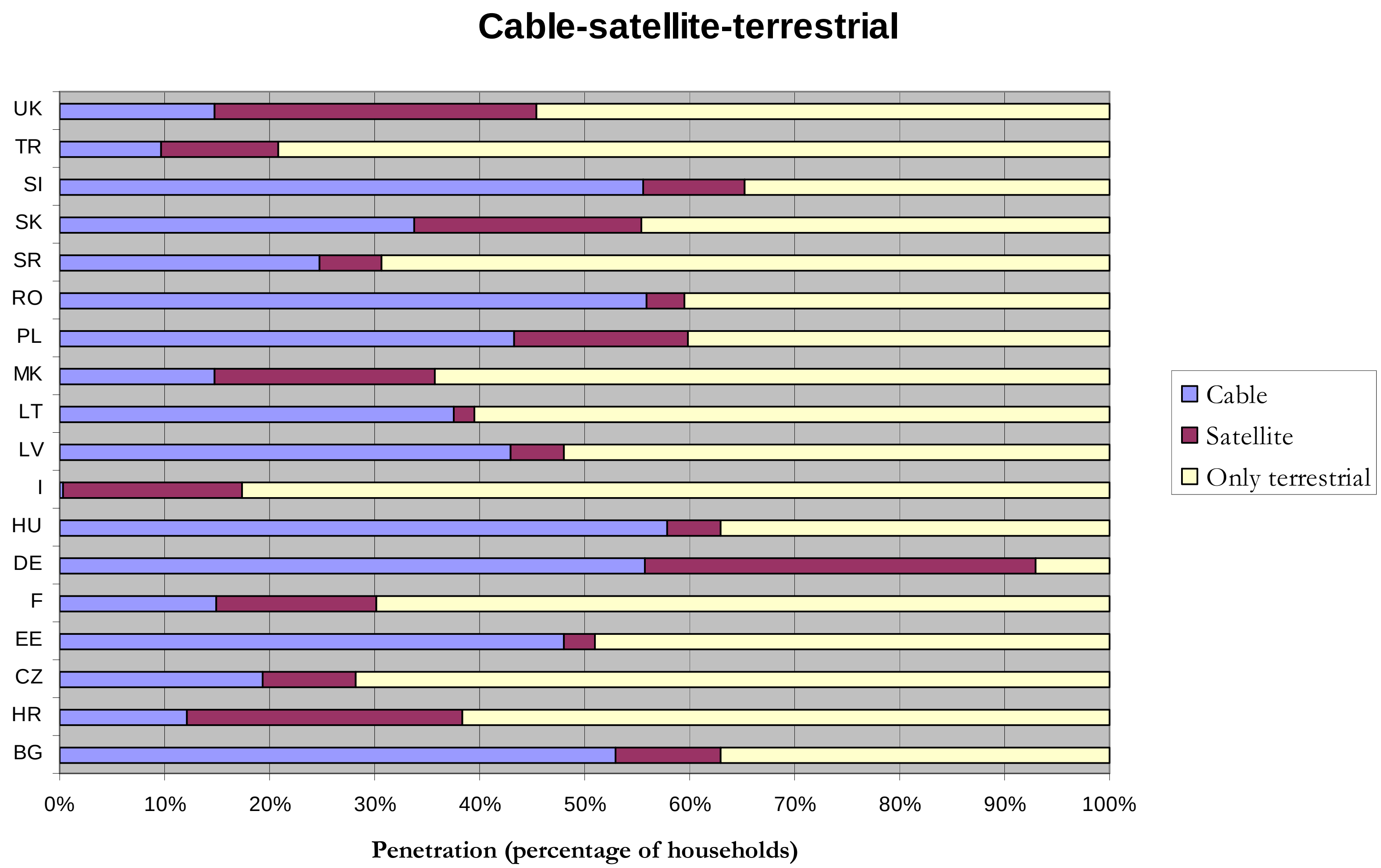
AVERAGE REVENUE PER CAPITA OF THE PUBLIC BROADCASTING SYSTEMS (2000) - EUR/HABITANT

	Aids / Grants	Licence fee	Other public income	Adver-tising	Sponsor-ship	Sales of Progra-mmes	Merchan-dising	Pay-tv	Other commercial revenues	Others	TOTAL
SWISS	*1,9*	*98,2*		*44,3*		*5,1*			*7*		*156,5*
DENMARK		*78,7*		*27,5*	*0,2*	*1,1*	*1,1*		*6,6*		*115,2*
UK	*6,7*	*60,7*	*0,2*	*18,1*	*0*	*5,6*	*8*	*0,6*	*2,7*	*1*	*103,7*
GERMANY	*3,9*	*73,6*		*8,1*	*0,3*	*0,4*			*10,1*	*0,8*	*97,2*
FRANCE	*2,3*	*34,4*		*11,9*	*0,2*	*0,7*		*0,3*	*4,2*	*1,8*	*55,8*
ITALY	*0,1*	*22,7*	*1,2*	*19,2*	*1,4*	*2,6*		*0,7*	*0,5*	*0,8*	*49,2*
GREECE	*0,7*		*18,3*	*2*							*20,9*

PROFIT MARGIN (%) OF PUBLIC TELEVISION COMPANIES (1995-2000)

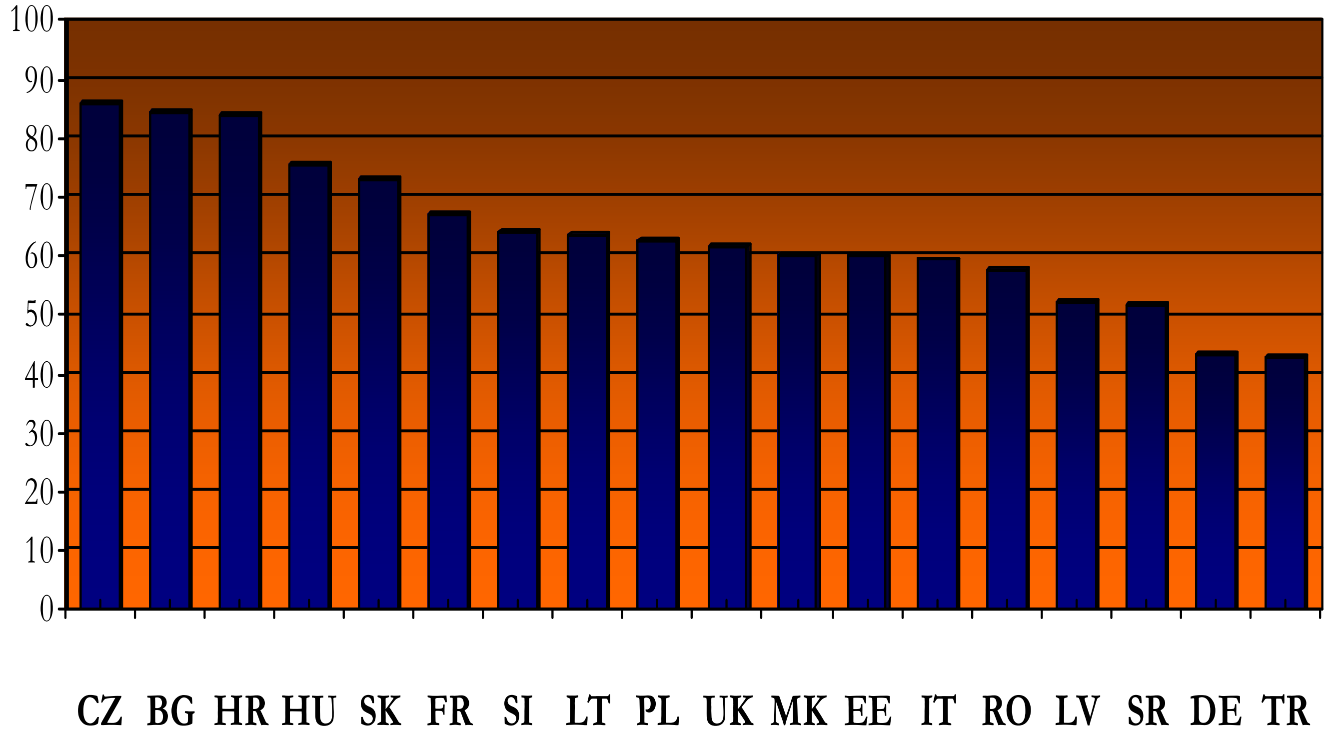
	1995	1996	1997	1998	1999	2000
GERMANY	*-0,6*	*-2,84*	*5,88*	*1,67*	*-0,37*	*-2,5*
SPAIN	*-10,41*	*-10,14*	*-8,42*	*-16,22*	*-25,36*	*-27,76*
FRANCE	*2,49*	*-0,51*	*2,53*	*0,43*	*-1,47*	*0,71*
UNITED KINGDOM	*4,36*	*3,33*	*1,29*	*2,62*	*1,45*	*1,59*
ITALY	*4,08*	*8,04*	*8,7*	*7,14*	*6,76*	*4,53*

TV NÉZÉS- TRANSZMISSZIÓS VÁLTOZATOK EURÓPÁBAN

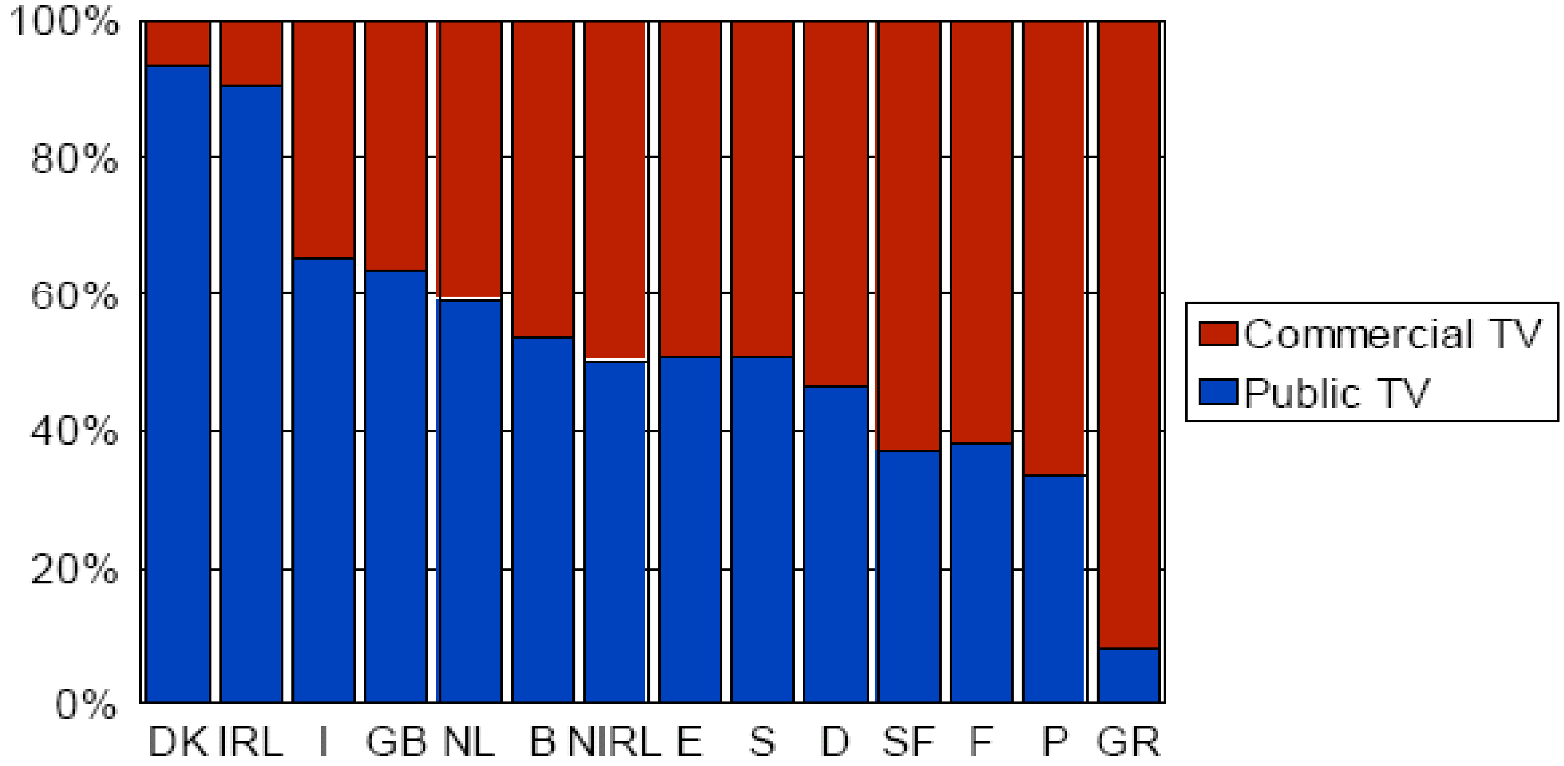


Concentration of national audiences

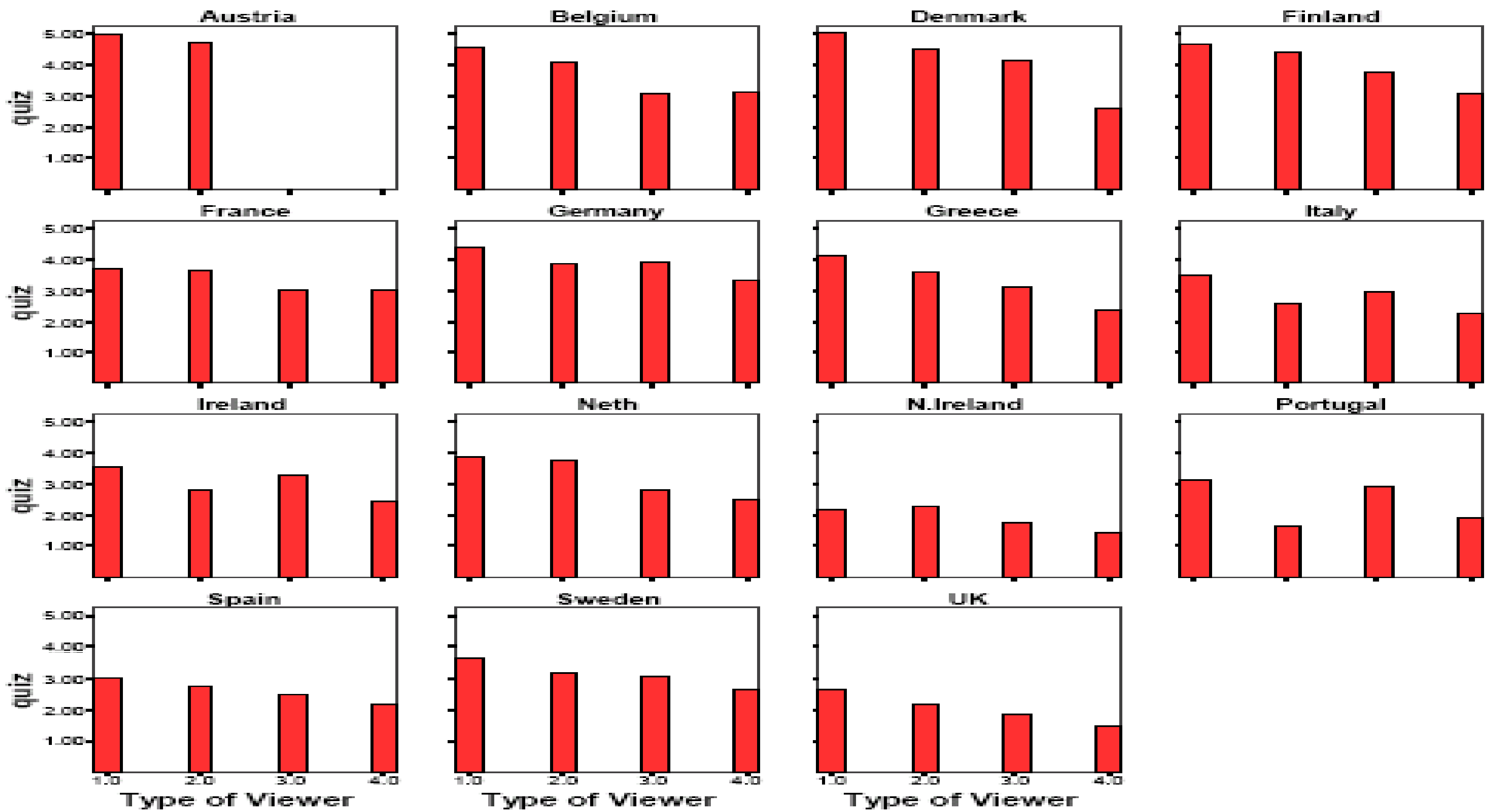
- **Aggregate audience share of the top 3 channels (per cent) share of the top three channels**



Kereskedelmi/köz preferenciák TV [BACHA-NORRIS, 1999]



POLITIKAI TUDÁSSZINTEK NÉZŐCSOPORTOKBAN
1.közTV hirfogyasztó 2. közTV szórakozó 3.kerTV hírfogyasztó 4.kerTV szórakozó [BACHA-NORRIS, 1999]



PUBLIC RADIO FORMATS [US Arbitron classification, 2007]

1. News/Talk
2. News-Classical 2007
3. Classical Music
4. Jazz
5. News-Music
6. Adult Album Alternative [AAA]/Eclectic
7. News-Jazz
8. Variety Music

Table 3. The EU broadcasting market – breakdown by type of broadcaster (1998–2002)

	Total net revenues (€ million)					Change in net revenues 2002/2001	Share of total net revenue 2002
	1998	1999	2000	2001	2002	(per cent)	(per cent)
Total	50,213	56,961	63,269	66,259	65,387	-1.3	100
Public broadcasters (radio and television)	23,353	25,689	26,896	28,549	27,769	-2.7	42.5
Commercial broadcasters (television)	14,548	16,640	18,713	18,187	17,349	-4.6	26.5
Commercial broadcasters (radio)	3,302	3,302	3,893	3,898	3,935	1.0	6.0
Home shopping companies	727	1,034	1,297	1,518	1,730	13.9	2.1
Pay-TV companies	2,989	3,320	3,569	3,784	3,915	3.5	6.0
TV packagers	3,671	4, 956	6,485	7,410	7,722	4.2	11.8
Thematic channels	1,623	2,019	2,416	2,912	2,967	1.9	4.5

Source: European Audiovisual Observatory[185]

Table 4. Top 10 European television companies (2003)
Ranked by unconsolidated operating revenues

Rank	Company	Country	Main activities	Type (public/private)	Unconsolidated operating revenues (€ million)
1	British Sky Broadcasting	UK	TV	private	4,242.1
2	BBC Home Service	UK	TV+Radio	public	4,214.1
3	RAI	Italy	TV+Radio	public	2,736.7
4	RTI	Italy	TV	private	2,008.2[186]
5	ZDF	Germany	TV	public	1,778.4[187]
6	TF1	France	TV	private	1,596.2
7	RTL Television	Germany	TV	private	1,589.0
8	Canal+	France	TV	private	1,585.0
9	France 2	France	TV	public	1,573.5
10	France 3	France	TV	public	1,416.0
	Total	–	–	–	22,739.2

Source: European Audiovisual Observatory[188]

Zuschauermarktanteile der Fernsehanbieter in Deutschland
(in Prozent der gesamten Nutzungszeit)

	1985	1986	1987	1988	1989	1990	1991	1992	1993	1994
ARD I+III	53,9	55,4	52,8	48,9	43,1	40,0	36,1	29,8	24,9	25,2
ZDF	42,5	40,1	40,8	36,2	31,9	28,7	25,8	21,3	18,0	17,0
RTL (plus)	2,0	1,7	3,1	4,0	9,4	11,7	14,1	16,9	16,9	17,5
SAT.1	1,5	2,6	3,2	6,5	8,5	9,1	10,3	13,2	14,4	14,9
PRO 7						1,2	3,8	6,7	9,2	9,4
Übrige				4,4	7,1	9,3	9,9	12,1	14,6	16,0
Total	100	100	100	100	100	100	100	100	100	100

Quelle: DARSCHIN/FRANK 1995, S. 156 sowie frühere Zahlen der GfK-Fernsehforschung,
zitiert nach Tonnemacher 1996, S. 141

Table 5. Concentration of national audiences (2003)

Ranked by aggregate audience share

	Top 3 channels (in terms of audience share)	Aggregate audience share of the top 3 channels (per cent)
Czech Republic	TV Nova, ČT 1, Prima TV	86.1
Bulgaria	bTV, Kanal 1, Nova TV	84.2
Croatia[189]	RTL Televizija, HTV 1, Nova TV	83.8
Hungary	RTL Klub, TV2, MTV 1	75.7
Slovakia	Markíza TV, STV 1, Joj	72.9
France	TF 1, France 2, France 3	66.9
Slovenia	Pop TV, SLO 1, SLO 2	64.2
Lithuania	LNK, TV 3, LRT	63.4
Poland	TVP 1, TVP 2, Polsat	62.6
UK	BBC 1, ITV 1, BBC 2	61.7
Macedonia	A1 TV, MTV 1, Sitel	60.0
Estonia	TV3, Kanal 2, ETV	59.9
Italy	RAI 1, Canale 5, RAI 2	59.4
Romania	Romania 1, Pro TV, Antena 1	57.5
Latvia	LNT, TV 3, LTV 1	52.2
Serbia and Montenegro	Pink, RTS 1, BK	51.8
Germany	RTL, ARD, ARD 3	43.4
Turkey	Kanal D, Show TV, ATV	43.0

Source: EUMAP calculation, based on data from IP International Marketing Committee[190]

Table 6. Audience share of the leading channels (2003)

Country	Channel	Audience share (adults) (per cent)	Type of station
Albania[191]	Klan TV	21.5	Private
	TVSH	17.1	Public
Bosnia and Herzegovina[192]	FTV	23.8	Public
	HRT Zagreb	10.5	Public (Croatia)
Croatia[193]	RTL Televizija	39.5	Private
	HTV1	31.8	Public
Czech Republic	TV Nova	43.4	Private
	ČT 1	22.1	Public
Estonia	TV3	22.1	Private
	Kanal 2	19.8	Private
France[194]	TF1	31.8	Private
	France 2	20.5	Public
Germany	RTL	15.0	Private
	ARD	14.5	Public
Hungary	RTL Klub	29.5	Private
	TV2	29.4	Private
Italy	RAI 1	24.2	Public
	Canale 5	23.2	Private

Country	Channel	Audience share (adults) (per cent)	Type of station
Latvia	LNT	22.2	Private
	TV3	15.1	Private
Lithuania	LNK	27.0	Private
	TV3	23.9	Private
Macedonia	A1	28.9	Private
	MTV1	16.9	Public
Romania	Romania 1	28.4	Public
	Pro TV	15.6	Private
Serbia and Montenegro	Pink TV	21.2	Private
	RTS 1	20.4	Public
Slovakia	Markíza	45.9	Private
	STV 1	15.7	Public
Slovenia	Pop TV	29.0	Private
	SLO 1	24.9	Public
Turkey	Kanal D	15.0	Private
	Show	14.4	Private
UK	BBC 1	26.3	Public
	ITV 1	24.3	Private

Source: EUMAP research, based on data from IP International Marketing Committee and European Audiovisual Observatory[195]

Table 12. Funding of public service television broadcasters

Country	Name	Share of total budget (per cent)				Annual budget (€ million) (year)
		Licence fee	State budget	Commercial income (advertising and sponsorship)	Other	
Albania	TVSH	NA	58	8.6	33.4	7.8 (2004)
Bosnia and Herzegovina	BHRT B&H	NA	NA	NA	NA	NA
Bulgaria	BNT					25.05 (2004)
Croatia	HTV	57.4	0	36.0	6.6	171 (2002) (including radio)
Czech Republic	ČT	66.7	0	29.1	4.2	140.39 (2003)
Estonia	ETV	0	93.0	0	7.0	13.5 (2004)
France	France Télévisions	64.8	0	30.3	4.9	2,308.9 (2003)
Germany	ARD	94.0	0	6.0 (only advertising)	NA	5,371.0 (2003) (advertising and licence fee only)
	ZDF	93.3	0	6.7 (only advertising)	NA	1,677.0 (2003) (advertising and licence fee only)
Hungary	MTV					122.5 (2004)
	Duna TV	0	82.0	12.0	6.0	30.6 (2003)
Italy	RAI	55.2	0	38.8	6.0	2,593 (2003)
Latvia	LTV	0	57.0	43.0		12.35 (2004)
Lithuania	LTV	0	76.0	23.0	1.0	14.5 (2003)
Macedonia	MTV	80.2	0	12.1	7.7	15.7 (2004) (including radio)

Country	Name	Share of total budget (per cent)				Annual budget (€ million) (year)
		Licence fee	State budget	Commercial income (advertising and sponsorship)	Other	
Poland	TVP	31.9	0	56.3	11.8	416.5 (2004)
Romania	SRTV	75.5	14.3	8.38	0	96.0 (2003)
Serbia	RTS	0[203]	75.2	24.8		60.7 (budget envisaged for 2004, including radio)
Slovakia	STV	60.2	16.8	18.8	4.2	59.76 (2004)
Slovenia	TVS	72.8	0	16.5	10.7	111.1 (2003) (including radio)
Turkey	TRT	53.7	21.8 (mainly)	10.4	14	254.7 (2003)
UK	BBC	94.0	0	0	6.0	4,211 (2002/3)
	Channel 4	0	0	100	0	1,262 (turnover for 2004)

Table 13. Daily audience market share of public service television (1995–2003)

Ranked by 2003 audience market share

	Daily audience market share of public television (per cent)								
	1995	1996	1997	1998	1999	2000	2001	2002	2003
Croatia[204]	NA	NA	NA	NA	94.5	94.3	88.0	90.0	72.9
Poland	80.0	70.0	57.5	52.6	51.1	46.2	45.4	45.9	51.2
Italy	48.2	47.9	48.1	48.0	47.6	47.3	46.9	46.5	48.6
France	43.9	44.9	44.1	43.0	42.2	42.3	45.3	45.3	46.4
UK	54.3	54.9	53.0	51.1	49.5	48.5	48.0	47.6	46.2
Germany	40.1	40.6	40.5	42.5	42.8	43.1	43.3	44.4	44.4
Serbia and Montenegro[205]	NA	NA	NA	NA	NA	26.4	NA	35.7	35.5
Romania	NA	NA	NA	46.4	39.2	40.4	35.9	33.3	35.0
Slovenia	61.5	41.0	33.0	32.4	32.1	32.9	34.4	35.1	34.7
Bosnia and Herzegovina[206]	NA	NA	NA	NA	NA	NA	NA	NA	31.8
Czech Republic	NA	27.35	NA	33.29	32.1	31.22	29.2	29.4	30.2
Bulgaria	NA	89.8	75.1	76.0	69.6	66.5	31.8	30.0	24.8
Slovakia	73.7	63.2	27.5	24.3	18.1	18.4	20.2	21.0	21.8
Macedonia[207]	NA	NA	NA	NA	NA	37.6	NA	32.0	21.2
Latvia	NA	NA	NA	24.9	18.3	18.2	18.1	17.4	18.4
Hungary	79.0	72.7	NA	25.5	15.6	13.6	13.2	15.3	17.5
Albania[208]	NA	NA	NA	NA	NA	NA	NA	17.1	NA
Estonia	28.0	26.0	NA	22.4	18.3	16.6	17.1	18.0	16.7
Lithuania	NA	NA	NA	16.3	10.3	10.2	9.1	12.2	11.8
Turkey	NA	4.1	NA	2.2	5.3	5.9	6.9	8.3	9.9

Source: European Audiovisual Observatory; IP International Marketing Committee; EUMAP research[209]

KÖZMÉDIÁK GYÁRTÁSI KAPACITÁSAI

Production Financing by Public Service Broadcasters in 2001

	Original Production		Independent Production	
	Quota	Actual Results	Quota	Actual Results
BBC	No	75%	At least 25% of programmes	26.5%*
SVT	No	73%	Article 5 of the TWF directive	-
ARD	No	90%	Article 5 of the TWF directive	60% of the 90%
RTVE	-	40%	Article 5 of the TWF directive	40% of the 40%
RAI	-	52%	20% of monthly transmission	47% of the 52%

* 1999/2000

Source: IDATE, based on broadcasters' returns

KÖZTELEVÍZIÓK DTTV KEZDEMÉNYEZÉSEI, 90es évek végének programvíziói]

Country	Start Date	Initial Coverage	Date announced for the withdrawal of analogue	Number of multiplexes	Multiplexes dedicated to public service
United Kingdom	15 Nov. 1998	70%-90%	2006-2010	6	1 + 1 supplementary in 2002
Sweden	1st April 1999	50%	2007	3 then 6	1
Germany	Pilot scheme running in Berlin/ Brandebourg		2010		On a regional basis
Spain	1999	20%-50%	2012	5 national + 1 regional	1/5 of multiplexes currently
Italy	(test period until 2004)		2006		1

DTTV STRATÉGIÁK

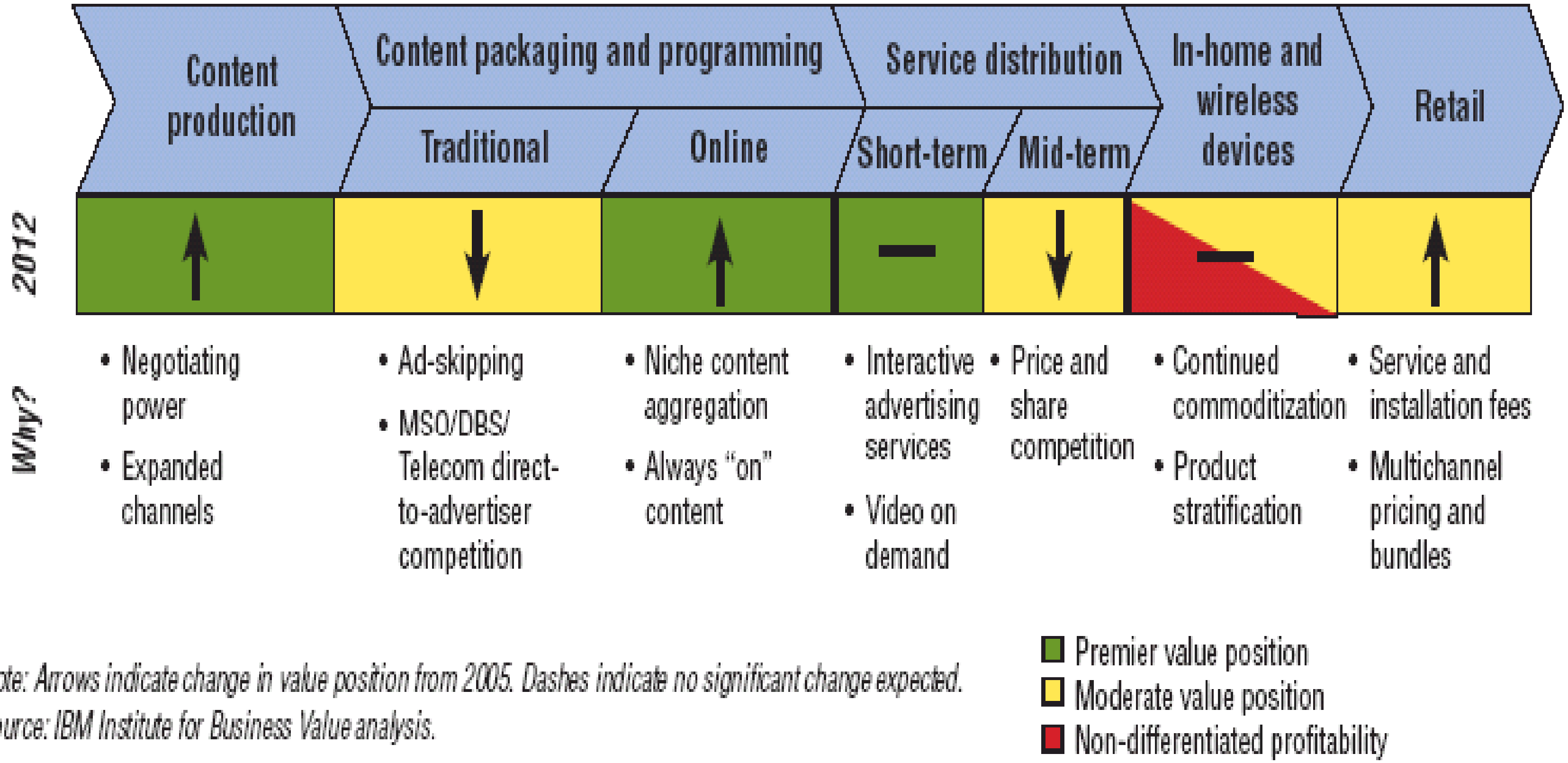
Figure 6. Examples of emerging business models.

	Akimbo	BBC "My BBC Player"	CBS and Comcast	Disney and Apple	MTV "Overdrive"	NBC-Universal and DIRECTV	Time Warner Cable "Start Over"	Warner Bros. and AOL "In2TV"	Yahoo and TiVo
Consumer device	TV	PC	TV	iPod	PC	TV	TV	PC	TV, PC
Revenues at launch	Monthly user fee of $9.99	No user fee	$0.99/episode Advertisements (but can be skipped)	$1.99/episode No advertisements	Skip-resistant advertisements	$0.99/episode No advertisements	Free access with TV cable subscription Skip-resistant advertisements	No user fee Skip-resistant advertisements	Access with TiVo subscription
Attributes	• Proprietary set top box required for on demand • Content includes Turner Classic Movies, BBC and Discovery	• P2P media player for BBC content • Most shows available for seven days after first run • To launch 2006	• CBS owned content to Comcast subscribers in markets with CBS owned and operated stations • To launch 2006	• Episodes of select ABC content one day after airdate on video iPod • PC playback with QuickTime	• Five genre-driven video channels • Music videos, trailers, news, behind-the-scenes footage	• NBC owned shows on demand to DIRECTV subscribers • To launch 2006	• Program restart anytime during its broadcast window • No ability to save programs	• 14,000 episodes available • Six thematic channels • One minute of advertising inserted into show • To launch 2006	• TiVo functionality for Yahoo media content (Launch) and video search • To launch 2006

Source: Company Websites; IBM Institute for Business Value analysis.

DTTV STRATÁGIÁK II

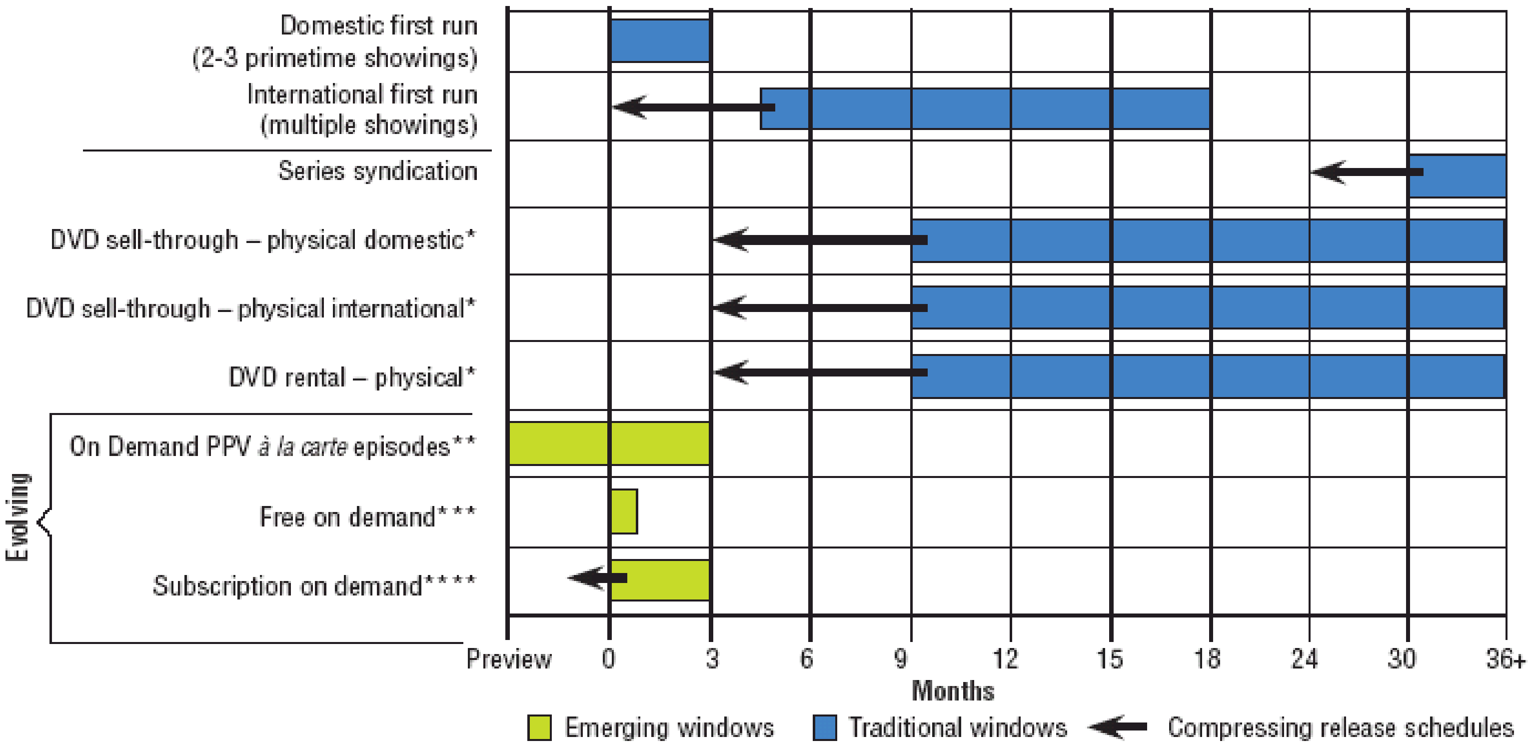
Figure 9. Speculative value shifts 2005 - 2012.



Note: Arrows indicate change in value position from 2005. Dashes indicate no significant change expected.
Source: IBM Institute for Business Value analysis.

DTTV STRATÉGIÁK III

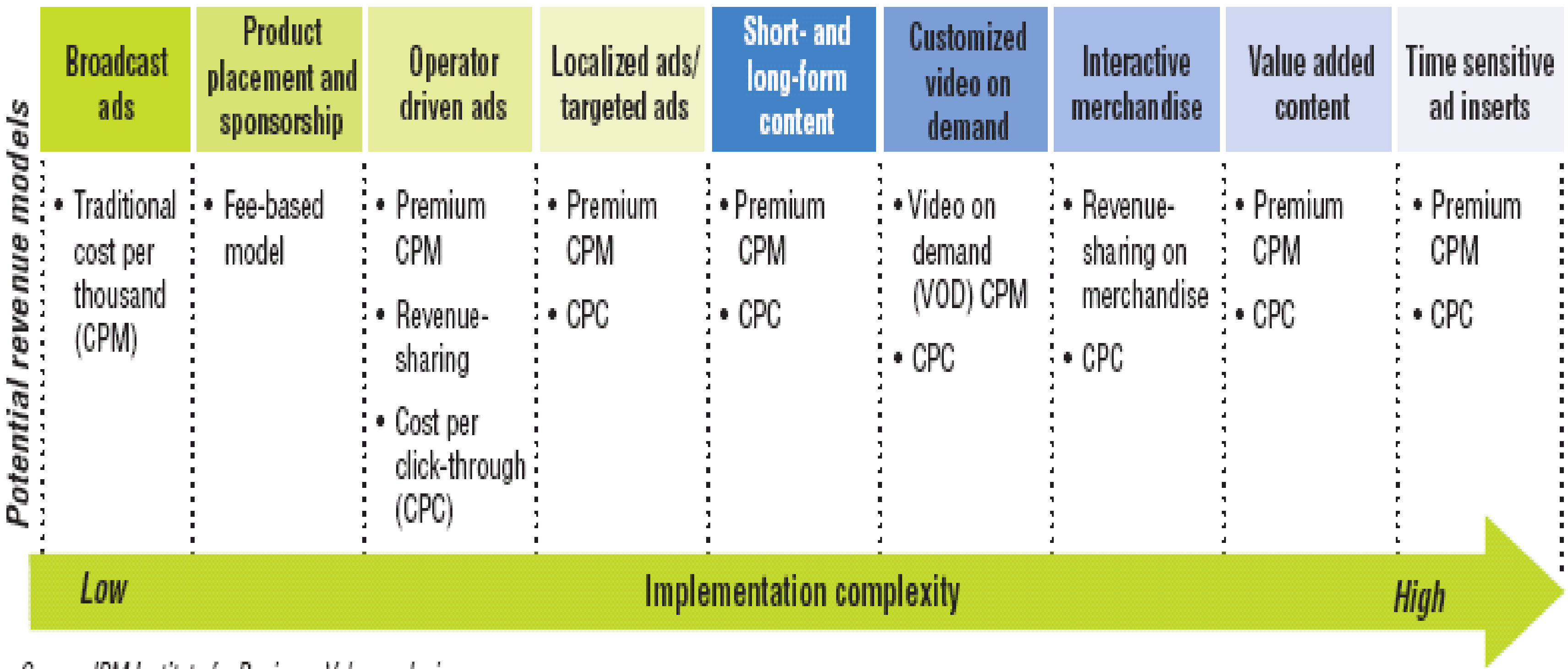
Figure 11. Evolving TV content release windows.



*Notes: *DVDs assumed to contain one (or more) season of TV content. **PPV on STB, iPod, media center, disc, etc. ***Primetime available after first airing free of charge. ****Subscription pay TV "on-demand" after first airing.*
Sources: IBM Institute for Business Value analysis.

DTTV STRATÉGIÁK IV

Figure 12. The spectrum of possible future advertising models.



Source: IBM Institute for Business Value analysis.

RÁDIÓS STRATEGIAI KÉRDÉSEK

1. A „szájbarágás mértéke”. Tudatosan vállalt leegyszerűsítések mértéke- a kereskedelmiek ellenpontja lenni így is.
2. Digitális lehetőségek. Részben ugyanazt a content-et különböző formátumban kiszerelni. On demand formák terjedése
3. Újmódokon bekapcsolódó hallgató [új platformok] hatásai, igényei
4. Minority rádiózás felértékelődése [nem egyszerűen nyelvileg!]
5. A community radio hálozatokkal szerves interakció mértéke

KÖZMÉDIA STRATÉGIÁK GAZDASÁGI ELEMEI

A. Media production economy- gyártási kapacitások fejlesztése függetlenként, vagy kvóták alá
B. Tematikus csatorna fejlesztés [majdani DTTV alá]
C. Kommercializáció [ZDF Enterprises, RAI Trade, RAI Cinema, BBC a „public service”ről leválasztott kereskedelmi tevékenység

HÁLÓZATÉPITÉSI STRATÉGIAK I

- Toolkits – activities or tools licensees can use to achieve best practices without need for collaboration
- Service Clouds – stations outsource significant activities created for specialized purposes
- Colonizers – efforts to operate public broadcasting mission elements independently with or without station involvement

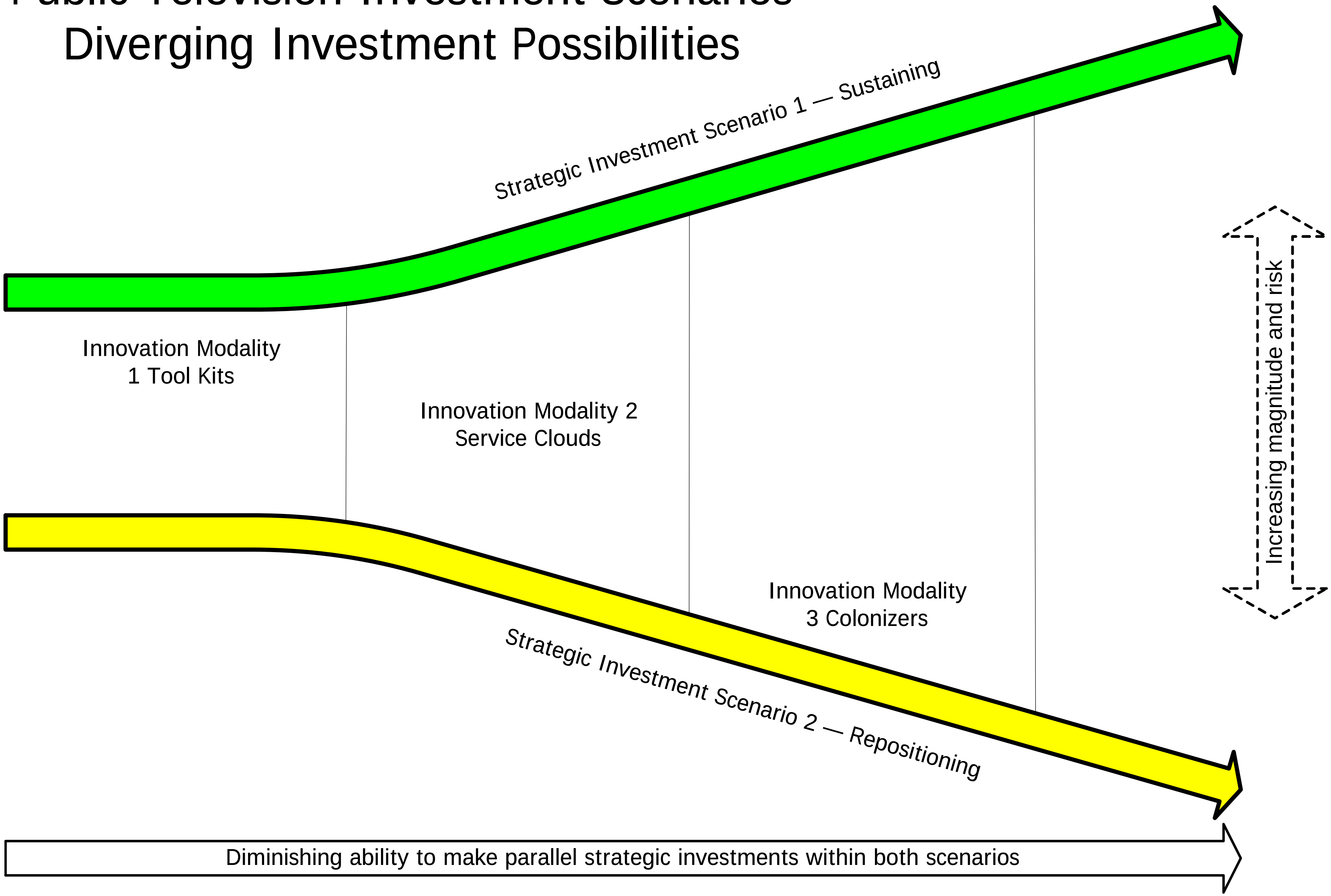
ÁLLAPOTMEGŐRZŐ SCENARIÓK

- Make strategic investments in initiatives that sustain the legacy (broadcasting) business
- Tends to maintain operational independence
- Preserves as much “gross tonnage” of public service as possible, at least in near term; lengthening the “glide path”
- High investments in “toolkits,” somewhat lower investments in “service clouds,” little in “colonizers”

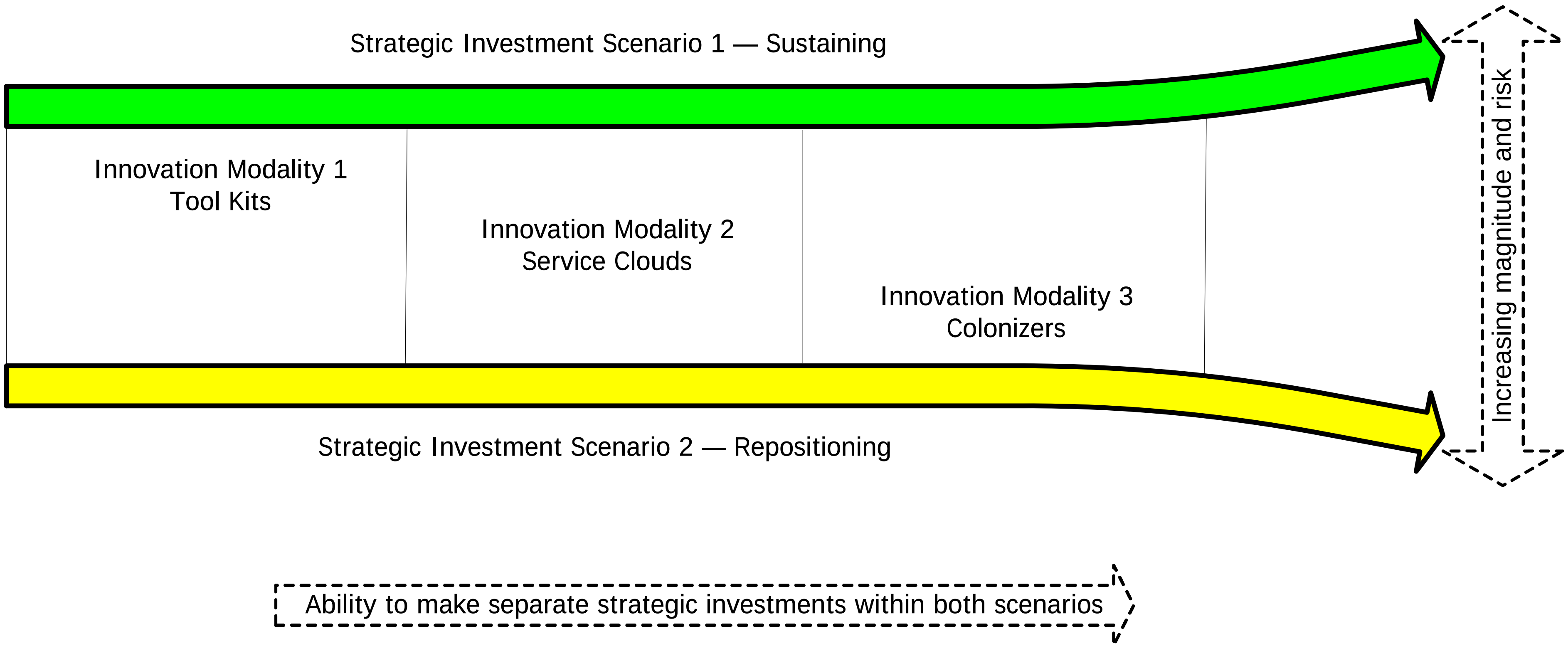
ÚJRAPOZICIONÁLÓ SCENARIÓK

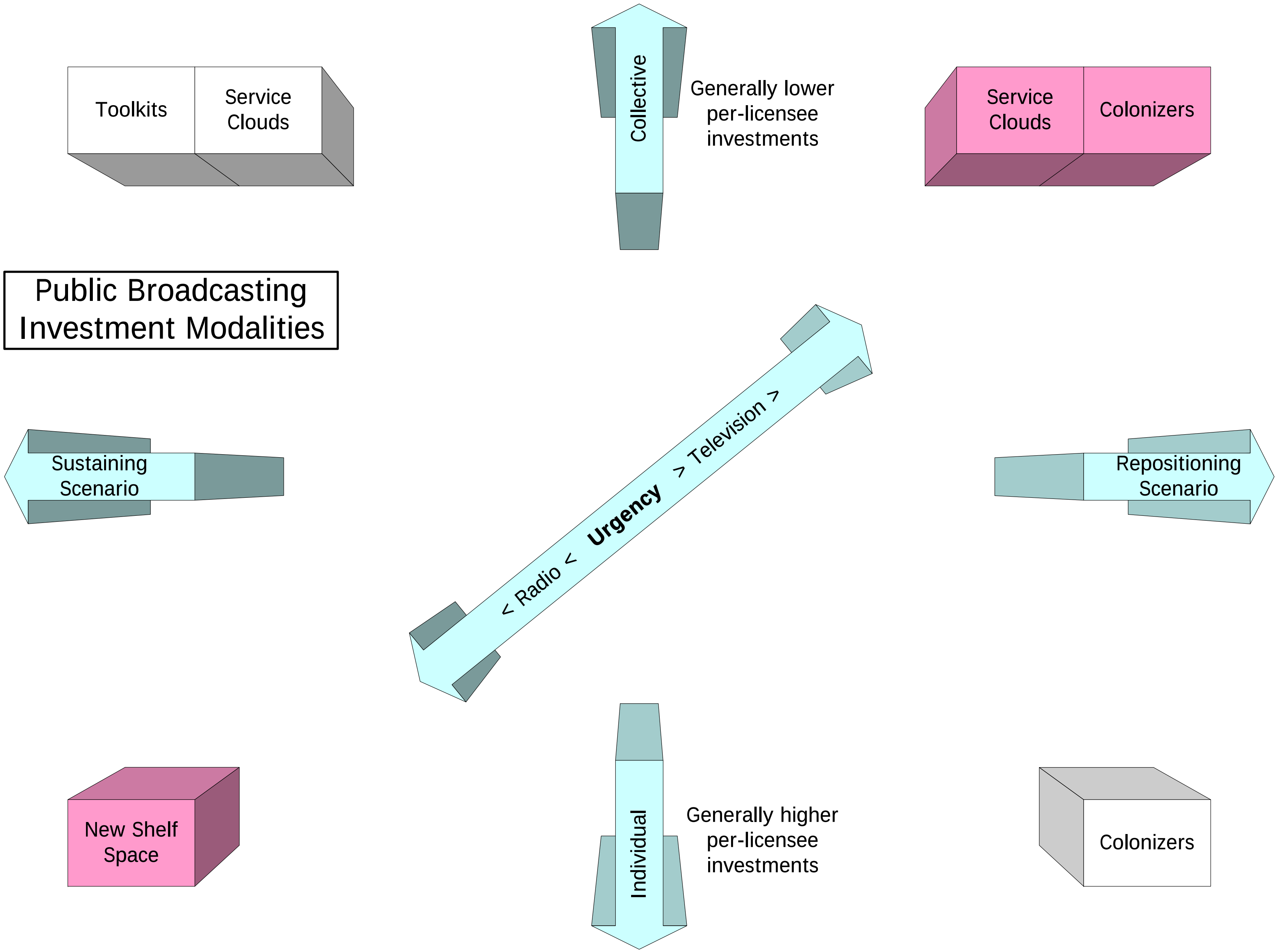
- Make strategic investments in initiatives that reposition public television in new directions consistent with historic mission
- Capacity and scale created at collective level
- Emphasis on editorial (programming) rather than operational independence
- Accepts the current “glide path” but creates new “climb paths”
- Increased investments in “service clouds” and “colonizers”

Public Television Investment Scenarios
Diverging Investment Possibilities



Public Radio Investment Scenarios: Parallel Tracks Possible




Public Broadcasting Investment Modalities
Toolkits
Service Clouds
Collective
Generally lower per-licensee investments
Service Clouds
Colonizers
Sustaining Scenario
< Radio < Urgency > Television >
Repositioning Scenario
New Shelf Space
Individual
Generally higher per-licensee investments
Colonizers

A HAZAI ALAPKÉRDÉS FOLYAMATOSAN:

URALKODÓ KÖZMÉDIA SCENÁRIÓ =
A VÉG KEZDETE, VAGY ÚJRAKEZDÉS?