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An approximation to the configuration of Spain’s audiovisual media in 2014. The case of Canal Sur TV

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Abstract

Introduction. Based on the analysis of the most important developments in the configuration of the Spanish and Andalusian public audiovisual sector up until the summer of 2014, this article proves that the current Spanish media landscape is characterised by concentration and, at the same time, by the diversification and internationalisation of capital. **Method.** The study is based on the structural approach, which involves the examination of the Political Economy of Communication, Information and Culture. **Results and conclusions.** The study has confirmed, once again, the existence of a hidden network of interests that involve media and non-media-related business groups. The article argues in favour of the development of a public television system that is properly managed as a public service, and contends that the current characteristics of the private television industry do not fully fulfil the rights of the Spanish citizens.

Keywords

Historical perspective; context; diversification of capital; outsourcing; politicisation.

Contents

1. Introduction. 2. Hypothesis. 3. Method: structure and ownership. 4. Results. Outline of the configuration of the Spanish audiovisual media sector (up until the summer of 2014). 5. Results. The case of Canal Sur TV: an approximation. 6. Conclusions. 7. Notes. 8. List of references. 9. List of news articles.

Translation by **CA Martínez Arcos**, Ph.D. (Universidad Autónoma de Tamaulipas)

1. Introduction

To approach its object of study, this article takes into consideration the two key factors needed to understand, in general terms, any subject matter: the historical perspective and the context in which the event takes place.

This article offers a chronological outline of the way the audiovisual media sector has been configured in Spain, taking into account, first, the descriptions offered by our book titled *Los dueños del periodismo* (“The owners of journalism”, Reig, 2011), whose outline of the configuration of the Spanish media system covers from 1923, when Radio emerged in Spain, up to 2011, and, second, a recent study conducted recently to obtain an updated view of the situation of the audiovisual media sector up until the summer of 2014, when this article was written. In the last three years there have been important events that must be taken into account.

The context and meanings of the past and current developments will also be addressed in this article. The description of the event and its meaning involve the aforementioned cognitive factors: the historical perspective and the context.

The outline of the configuration of the Spanish media sector will be based on the premises of the structural approach which, on this occasion, will focus on providing an overview of the management, communication policies and contents related to the public television sector in Spain. Due to our geographic proximity with Andalusia, the study will focus on the programming of Radio Televisión de Andalusia (RTVA) –and Canal Sur TV in particular–, which is one of the most popular regional TV networks. As we will see later, in 2013 and in June 2014, TV3, Aragon TV, TVG, Canal Sur TV and ETB were, in this order, the most popular regional networks [1].

In order to facilitate the understanding of this study, our exposition follows a simple style in the form of notes.

2. Hypothesis

The study of the development and, above all, current state of the audiovisual media landscape in Spain offers a clear example of the articulation of the different production sectors. There are no “pure communication” entrepreneurs but production agents that diversify their work towards all those sectors that can afford them any type of benefits, whether economic or in terms of influences. In addition, politics and the trends of the global market, i.e. the political economy, have a clear effect on both in public and private audiovisual media.

3. Method: structure and ownership

To facilitate the understanding of this section we will articulate various elements derived from the configuration of the Spanish audiovisual sector, and of public television in particular. Based on the premises of the aforementioned structural approach, we believe it is necessary to take into account significant events related to the private audiovisual sector in order to contextualise our object of study.

The theoretical foundation of the structural method is broad but at this point the description of its basic pillars suffices to understand it. The rector of the Complutense University of Madrid, and Professor of Applied Economics, Carlos Berzosa, in the foreword of a book dedicated to the also Economist, Professor and writer José Luis Sampedro (Berzosa, 2009, Sampedro, 2009), points out that:

“In view of the serious problems confronting the world today, and despite the progress made, structural analysis is essential to learn to ask the right questions and try to find the right answers when it comes to understand what is going on.”

Sampedro is a methodological and empirical Economist and when he applies the structural analysis to understand what is taking place he indicates:

“With the support of more independent authors, I stand by my opinion about the decline of the system. It is true that the law offers equality, [but it is] completely false given the unfair distribution of the wealth of the planet among its inhabitants, [this] inequality has not been corrected throughout the decades in which the abolition of poverty has been promoted. It is also true that the system proclaims democratic statements, but reality confronts us with oligarchic organisations that maintain their power thanks to the dominance of the media, with the subsequent manipulation of the public opinion, and justify themselves with the ideologies developed by the intellectuals at their service. (...). And with regards to freedom, one just has to take a look at the same media companies to immediately wonder who their real beneficiaries are.”

Sampedro combines several elements in his reflection: law, economics, society, power, a media world articulated with power and the economy, ideology, and philosophical concepts such as the freedom. This is a structural method of analysis. To be able to understand what happens to us at the individual and ‘global’ levels (which interact with each other) we need this method, which is precisely the one almost always ignored by the media and even the programmes of study. The result is functional illiteracy.

Poet Luis García Montero (2009) has strongly criticised the fusion of the economy politics and information. “One of the biggest attacks against democracy, even greater than the barbaric aggression against the twin towers, is the attack that the powerful economic groups execute when they humiliate the veracity of information with their commercial and political interests.” We are facing what Marciel Detienne calls a comparatist (in Checa Godoy, 2008), which is peculiar to the structural approach:

“As it moves forward, the comparatist gets the feeling he is discovering a set of possibilities, whose conceptual use allows him to highlighting unique elements (...). The comparatist performs a logical dismantling that allows him to discover the existing articulations between two or three elements [and] to isolate the micro-configurations that allow him to see the differences more and more sharply and contiguously.”

In today’s world –as we all know very well– the application of the structural method involves identifying a network of articulated interests that take us from public to the private spheres and vice versa, and from the local and the regional to the national and from the national to the international and vice versa. It is an inductive-deductive dynamic that involves connections with sectors that are not related the communications industry, in general, and to the audiovisual media in particular. This is known as media concentration but this is a type that also involves the diversification of capital (Reig, 2010).

This study exemplifies the previous arguments, which can be summarised as follows: the media power has increasingly been concentrated in few hands, and at the same time, shareholders from other production sectors have rapidly become part of the boards of directors of the media and audiovisual groups while the media groups have also gone beyond their theoretical social *raison d’être*. This market tendency is common around the world, and has been stimulated, *de facto*, by the

political power despite the efforts made by the later to limit the excessive concentrations of media power.

The immediate origins of this trend date back to the 19th century, and especially to the end of this century. Globalisation did not emerge suddenly unlike most historical phenomena (Curran, 2002). The film *Citizen Kane*, which is partly based on the life of the mogul William Randolph Hearst, shows that the diversification of capital was already taking place during that time. Kane did not only own newspapers and then radio stations but also forests, paper factories, retail stores, unions, shipyards, etc. The first fifteen minutes of this film show how the media concentration and the diversification of capital were taking place simultaneously.

In less than three centuries, these phenomena have dramatically intensified and have caused the decline in the quality of journalism and have prompted certain governments –like those of Argentina, Ecuador and Bolivia, for example, in the case of Latin America– to try to reorganise media monopolies whose power stretches far beyond the media sector.

4. Results. Outline of the configuration of the Spanish audiovisual media sector (up until the summer of 2014)

We believe that to understand this part of our work it is necessary to identify the key stages of development of the audiovisual media sector, with their corresponding meanings, as part of our methodological approach. This approach allows us to offer the most outstanding results of our research. We tiptoed throughout the 20th century to immediately enter the 21st century and reach what in journalism we know as the “rabid present”, which has been adapted to the purposes of our academic research study. Our method recommends us to develop a historical perspective that allows us to rapidly reach the current context.

1956

Television was founded in Spain by the Franco regime. The first “massive” broadcast was the Royal Wedding of King Baudouin and Fabiola. Citizens’ habits experienced a transformation. The TV set became the main appliance and American films and series began to dominate Spanish television. It should be noted that television, in its origins, was not exactly focused on journalistic but on entertainment, and this focus continues today in free-to-air television, even news programmes have embraced infotainment, mostly in private channels.

Space limitations prevent us from providing references and force us to recommend basic works that allow the reader to follow the evolution of television. Thus, to know more about the television contents and audiences of this time, we recommend the reading of some classic works carried out by very relevant authors: Faus Belau, 1995; Rodríguez Márquez and Martínez Uceda, 1992; Bustamante, 2013; Ventura Fernández, 2001; Cebrián Herrero, 2004; Orive Riva, 1988; Rodríguez, 1993. There are many others works but the aforementioned studies describe the beginnings and, in a few cases, the current state of the object under study [2].

1969

The second channel of TVE, currently known as TVE2 and *La 2*, was launched in UHF (Ultra High Frequency). In this context, as Jesús Hermida has documented, Spain retransmitted the American TV signal showing men walking on the Moon for the first time, although the veracity of the landing is questioned today. This second channel was created to cater the needs of “the vast minority”.

The 1980s

The public-service television stations of Spain’s Autonomous Communities began broadcasting: ETB (Basque Country) (1982), TV3 (Catalonia) (1983), TVG (Galicia) (1985), Canal Sur (Andalusia) (1989), Telemadrid (1989), and Canal 9 (Valencia) (1989). This event brought more audiovisual complexity, the intensification of the promotion of "identity" of the Spanish communities, the politicisation-manipulation of the television institutions and the decline of the historical and anthropological rigour.

The following table shows the time in which the regional television corporations emerged in the autonomous communities of Spain, initially as public institutions, with the exception of the television network of Castile and León, whose foundation was prompted by the Promecal group, which had a strong presence in the newspaper industry.

Table 1. Launch date of the television stations in the Autonomous Communities

Channel	Year	Ownership
ETB (Basque Country)	1982 (December)	Public
TV3 (Catalonia)	1983 (September)	Public
TVG (Galicia)	1985	Public
Canal Sur (Andalusia)	1989 (February)	Public
Telemadrid	1989 (May)	Public
Canal 9 (Valencia)	1989 (October)	Public
TVC (Canary Islands)	1999 (August)	Public
TV Castilla-La Mancha	2001 (December)	Public
IB3 (Balearic Islands)	2005 (March)	Public
TV de Murcia	2006	Public
TV de Aragón	2006	Public
TV de Asturias	2006	Public
TV de Extremadura	2006	Public
Castilla y León TV	2009	Private (Promecal)

Source: Authors’ own creation.

2001-2007

During this period the new regional public television stations of the Autonomous Communities began broadcasting: TV Castilla-La Mancha (2001); IB3 (Balearic Islands) (2005); TV de Murcia (2006); TV de Aragón (2006); TV de Asturias (2006); TV de Extremadura (2006).

In 2005 the RTVE (Spanish Radio and Television) Corporation, a 100% publicly-owned company, began broadcasting. TVE has lost its position as the most watched TV network in Spain to Tele 5 and Antena 3 TV, which were launched in 1990 after being licensed a year earlier, in public tender, to Berlusconi/ONCE and Godo/Prensa Española, respectively (Reig, 1998).

In view of the coming “analogical blackout” of 2010, between 2005 and 2006 the introduction of Digital Terrestrial Television (DTT) was heavily promoted through the awarding of channel licenses to all private TV networks and TVE. In addition, new free-to-air TV channels were launched: Cuatro (Prisa) and La Sexta (Imagina-Televisa), in 2005. [3]

On the other hand, during this time the outsourcing of programming in the regional television corporations was a common practice. For its part, the Director General of RTVE started to be elected by the Courts while TVE had its subsidy reduced and had to take more into account the concept of public service. The conversion carried out by the Spanish Society of Industrial Participations (SEPI) tried to rationalise management and to bring this service closer to the dynamics of the market through downsizing (which provoked the loss of prestigious and valuable TV professionals and programmes).

At this time there was already an overwhelming programming offer in both radio and television. The fight for the audience reached its climax. The audiovisual companies continued to be owned, again and again and as a general rule, by the same big companies, linked to the Spanish Socialist Workers’ Party (PSOE) and the Popular Party (PP).

2008 to 2010

The analogue blackout was carried out in Spain in 2010. More than 40 DTT channels were launched. The blackout was carried out progressively since 2008. The blackout was pilot tested in a small area of the centre of the country, and then gradually implemented in more populated areas. Thus, an in-depth renovation took place in the construction and adaptation of buildings and inside Spanish households.

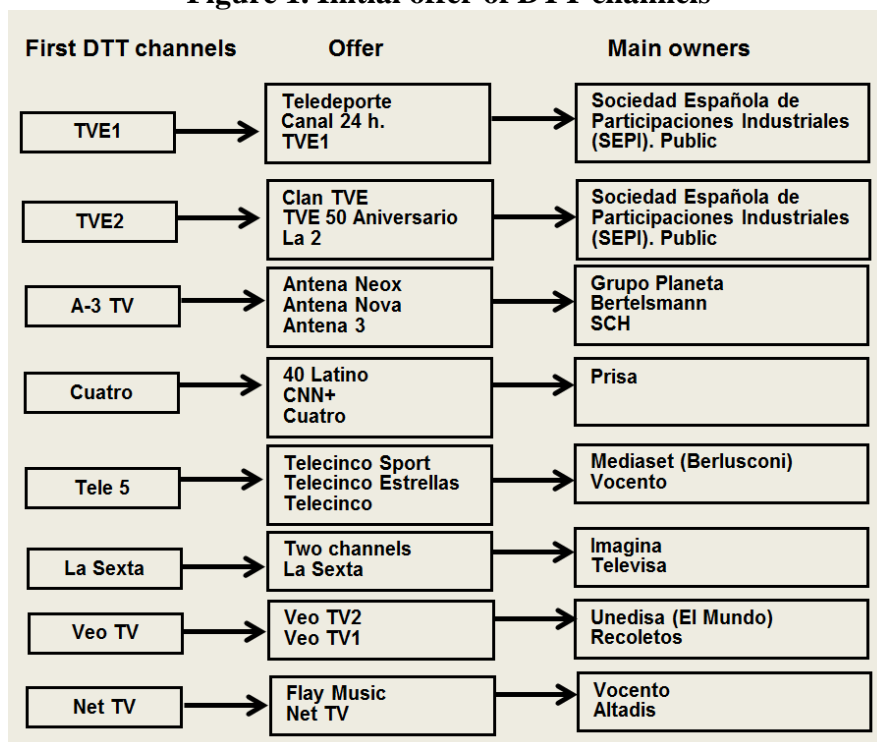
The analogue blackout was carried out in the spring of 2008 in small towns such as A Fonsagrada (Lugo) by the regional and the central governments. In summer of 2008 the blackout reached Soria.

Already by 2010 the companies investing in DTT estimated that their viability would be difficult with so many channels in offer. La Sexta believed that there would not be enough advertising investment for all channels, while Veo TV advocated for the elimination of advertising from TVE, and Antena 3 considered that it was necessary to find new funding formulas. At the time, it was estimated that by 2010 it would be possible to have DTT in free and pay systems.

The Spanish audiovisual sector began a historic era, characterised by an excessive offer of TV channels, which faced difficulties to remain profitable, and the added factor of the discrimination faced receivers due to their purchasing power.

The following figure gives an idea of the initial offer of DTT channels:

Figure 1. Initial offer of DTT channels



Source: Authors' own creation based on data from *Tendencias*, 2006, J. Fernández-Beaumont

As shown in the previous figure –leaving aside public television- six private companies had DTT licenses in Spain: RTVE, Mediapro, Planeta, Mediaset, PRISA, Vocento and Unedisa. Importantly, only those with a nationwide DTT licence could exploit pay DTT: the public corporation RTVE, and the private networks Antena 3 TV, Tele 5, Cuatro, Vevo TV, Net TV and La Sexta. This is the media oligopoly formed by the large multimedia corporations.

The financial crisis had a significant impact in the Spanish audiovisual sector. Its effects include the following:

- Prisa closed Localia in November 2008.
- Negotiations for the merger of television networks took place in the Spring of 2009.
- *El País*, 21-2-2009: “The Government encourages the merger of private broadcasters”.
- Media concentration increased. Restrictions were eliminated.
- Networks were allowed to have common shareholders.
- Zonal offer increased.
- April 2009: the Government announced that pay TV was also available in the DTT system.
- 2008: Disney and Intereconomía became part of the channel offer of Vocento’s Net TV.
- The central government promoted information inequality with its promotion of the pay-per-view TV system.

- The presence of foreign capital in the Spanish audiovisual sector increased as a result of the usual dynamics of globalisation.

However, in March 2009 the regional television of Castile and Leon was launched as part of the irrational increase in public spending which, as we will see later, was similar to what happened with Canal Sur TV.

2009 to 2011

The penetration of foreign capital, which we mentioned earlier, took place during these years. In the summer of 2009 the most important shareholders of the major networks were:

- Antena 3: Planeta (44,58%), RTL (20,5%), Banco de Sabadell (5%). [4]
- Tele 5: Mediaset (52%); Dresdner Bank (24.7%); Vocento (5.1%). [5]
- Cuatro: Prisa (100%) [6].
- La Sexta: 51% Grupo Audiovisual de Medios de Producción (GAMP) [7], Televisa (40%).
- Veo TV: Unedisa (100%).
- Net TV: Vocento (55%), Intereconomía (25%), Disney (20%).
- Digital +: Telefónica (21%); Prisa (79%).

The previous list of shareholders confirms what we previously pointed out in the description of the structural method and the diversification of capital. The Spanish audiovisual sector was penetrated by what we call “alien shareholders”, i.e. shareholders from non-communication sectors. The following table illustrates this situation:

Table 2. Presence of “alien shareholders” in the Spanish audiovisual media sector

Company	Sector	Shareholder in:
Rayet	Construction	Antena 3
Banco Sabadell	Banking	Antena 3
Dresdner Bank	Banking	Tele 5
BBVA	Banking	Vocento-Tele 5-Net TV
Grupo Santander	Banking	Prisa–Cuatro-Tele 5-D+
Supermercados	Retail	Mediaset–Tele 5-Cuatro
Milán F.C.	Football	Mediaset-Tele 5-Cuatro
Fiat-Chrysler (2009 alliance)	Automobile	Unedisa-Veo TV
Pirelli	Automobile	Unedisa-Veo TV
Telmex	Telecom	Televisa-La Sexta-A3 TV
Caja de Ahorros de Bilbao y Vizcaya	Banking	La Sexta-A3 TV
Deportes-Tiendas	Leisure	Disney-Net TV
Telefónica	Telecom	Digital+

Source: Authors’ own creation

It is important to keep in mind that if we talk about the Berlusconi's empire (Mediaset/Fininvest) we are also talking about business groups that are alien to the media sector, such as soccer, commercial centres and insurance. For example, Unedisa is linked to Fiat, which absorbed Chrysler in 2009 and is the main shareholder of Unedisa/Corriere della Sera. Fiat's shareholders include such companies as Pirelli. On the other hand, during this time Televisa had a partnership with Telmex (Carlos Slim), so Mexico's telecom sector was indirectly present in Spanish television, although it is not necessary to resort to the Mexican mogul Carlos Slim to prove this point, since Televisa's owners (whose main shareholder is the Azcarraga family, which is currently linked to Mexico's Institutional Revolutionary Party, which is the party in power) include companies that have nothing to do with communications such as Banamex, Coca Cola, Bacardi, and Corona, the beer brand (Reig, 2011).

In May 2009 the Spanish government (PSOE) approved the elimination of advertising from RTVE. Thus, it was necessary to establish new funding options, which ended up being the following:

- Governmental contributions (500-600 million euros per year).
- Contribution from private TV companies (3% of their income).
- Contribution from telecom companies (0.9%).
- 80% from the money collected from the commercialisation of the public radio spectrum, and the marketing of RTVE's own products and services.
- Sponsorship is allowed.

The share of TVE's budget that had to be invested in Spanish cinema was increased (6%). The new funding scheme made telecom companies to hand over 0.9% to its customers. Somehow, this is an approximation to the BBC model with the difference that in 2009 the latter employed 25,000 people in 43 countries while RTVE only employed 6,000 people. The BBC had a budget of almost 4 billion euros (21.8% share in 2008) while TVE only had 1.2 billion and a share of 16.1% in 2008.

The new situation prompted the public to defend the public TV which they feared would be left in the hands of private companies, which was a situation advocated by the government, whose congress allowed mergers between television channels in May 2009. The new regulation abolished the 5% share limit in cross-shareholding between companies as long as the accumulated average audience share of the operators does not exceed 27% of total audience.

The merger of two operators from the television sector also became allowed as long as they did not exceed this audience share and always ensure the existence of a minimum of three national private companies with different editorial direction. This regulation aimed to regulate the market in view of the proliferation of TV channels that resulted from the implementation of DTT.

Therefore, the media concentration was been stimulating as a response to the crisis. Anyway, with crisis and without crisis, the governments had been encouraging concentration for decades and in favour of the private sector, as it was demonstrated by the government's decision to ban TVE from exploiting pay TV (29-5-2009). In return, the government decided to include pay TV companies, such as Digital+ and Mediapro's football channel, Gol TV, among the companies that must pay taxes to support public television, although with a twist: while free-to-air TV networks must pay 3% of their income, pay-tv companies only have to pay 1.5% of their income.

In June 2009, Prisa and Imagina announced the merger of Cuatro and La Sexta and monopolised the football broadcasts (this merger was not completed due to the conflicts between the two companies

over football rights and due to profitability reasons because both companies had low audience levels of about 4%). Moreover, in October 2009 the Council of Ministers approved the General Audiovisual Communication Law (*LGCA*), which aimed to unify and update the dispersed and obsolete legislation of a sector going through a technological revolution and an advertising crisis.

In late 2009, Prisa and Fininvest-Mediaset (Berlusconi) announced the fusion of Tele 5 and Cuatro (being Fininvest the majority shareholder). In addition, Fininvest became a shareholder of Digital+ (22%). Almost at the same time, these media companies announced that Antena 3 and La Sexta have agreed to fusion.

In January 2010, the EU prohibited Spain to apply the new funding scheme of TVE until this scheme was proved to be in accordance with European legislation. In February 2010, the public TV network grew 2 points in audience share and recovered its first place in ratings with an 18.6% share, followed by T-5 (14.8%) and Antena 3 TV (12.8%). The advertising-phobia and the quality of TVE's programming explained this situation but the truth is that the media concentration was increasing even more. "Money has no ideology", the popular saying goes, and this may explain the Berlusconi/Prisa alliance. Thanks to this operation, Prisa improved its economy and its 4-billion debt did not seem so burdensome.

In June, a part of the press saw the situation in the following way: "Television has taken a turn of palpable consequences with the analogue blackout while the audience is getting fragmented each day, which can accelerate the much-trumpeted mergers between mainstream networks (Antena 3-La Sexta, Telecinco-Cuatro) as a way to face the new competition. And with good reason: themed channels have increased 5.6% throughout this year through DTT". [8]

An important fact is that in July 2010 the EU approved RTVE's new funding system [9]. As the *elmundo.es* pointed out, the European Commission deemed it compatible with the rules on state aid, but continued investigating the tax on telecom companies. In fact, in September 2010 the European Union rejected the 0.9% tax on telecommunications companies to fund the Spanish public TV system. The rejection of this tax represents 250 million euros less in TVE's annual budget. The Spanish government appealed this decision before the European Court of Human Rights. Meanwhile, there are new rumours of a merger between Antena 3 TV and La Sexta.

In September 2010, advertisers offered 250 million euros to TVE to allow advertising again. Advertisers seemed to wonder "How is it possible that, at least, between 10 and 12 percent of viewers may not receive advertising persuasion?" Indeed, it was an audience sector missed by the market in this regard. By 2011, TVE had a budget of 1.2 billion and welcome advertising back. *El mundo* saw both news stories in the following way:

"The board of directors of RTVE approved this week a budget of 1,200 million Euros for 2011, which is the same amount approved for this year. However, today is still unclear who provide the 250 million -which corresponded to the 'telecoms' taxes- after the legal services of the European Commission (EC) consider this tax on 'telecoms' illegal. In theory, the Government has pledged to provide the required amount, but a new ally has emerged. Advertisers offer the Government these 250 million in exchange for the return of advertising to RTVE". [10]

The alliance with Berlusconi began to take effect, and it had a price. In December 2010 CNN+ was shut down and replaced by 24 hours broadcasts of the Spanish version of *Big Brother: Gran Hermano*. CNN+ workers claimed in social networks that they had paid the consequences of the mismanagement of Prisa, consequence of the fusion of Prisa and Mediaset.

Meanwhile, RTVE predicted a deficit of 66 million euros for 2010. TVE was the leading network in terms of audience ratings in 2010, with a 16% average share. RTVE deficit is due, largely, to the fact that it obtained less than it expected from the 0.9% tax on telecoms, which was under review and paralysed by the EU. Also in December 2010, the Supreme Court decided to stop the ban on the tax imposed on telecom operators to fund RTVE [11] [12]. The Supreme Court considered that “the public interest underlying the contested rules [by Telefónica, Vodafone and ONO] is beyond doubt” and that the payment “does not put at risk the financial viability of the companies”. [13]

Nevertheless, in March 2011 the European Union tells Spain that funding RTVE with the tax on the telecoms operators is non-complaint with the law. At the end of that year, the budget cuts on the autonomous regional television corporations intensified, especially in the Principality of Asturias, and the news and rumours about the privatisation of these regional television corporations emerge again. The Popular Party (PP) became the party in power in various autonomous communities and the central government in Madrid.

2012-2014, the PP appeared on the scene and Telefónica skyrocketed

After the victory of the PP on 20 November 2011, the viability of the funding system of TVE was called into question. The new Government wanted to return to the advertising funding system, which would be a relief for the public expenditure but did not have the approval of the Commercial Television Union (*UTECA*). This tension between the government and the private television union continues to this day (summer of 2014).

This did not stop the PP from presenting a draft law that allows the privatisation of the regional television operators, which was the “historical” aspiration of this party. In April 2012, the Council of Ministers approved a draft law that allows the regional governments to privatise the regional public television channels but gives them the option of keeping the management, although in this case, they are required to have no deficit. In August-September 2012 the autonomous TV of Murcia privatises its management while the television channels of Aragon and Extremadura increase outsourcing to private companies. At the same time, in September 2012, Canal Sur 2 was shut down and its programming is moved to Canal Sur 1. [14]

Regarding RTVE, in April 2012 the Council of Ministers approved a Decree-law that reforms the system of renewal of RTVE and allows the President of the Corporation to be elected by absolute majority instead of the qualified (two-thirds) majority required by current law of Public Radio and Television [15]. The PP wanted to take advantage of its election by absolute majority in favour of its thesis and to solve the situation of RTVE, which had no President due to the partisan disputes since Alberto Oliart resigned in July 2011.

The same decree-law excluded the unions from the Board of Directors of RTVE as it decreased the number of directors from 12 to 9 and established that they all would be elected by Parliament and the Senate and that the government had no obligation of accepting 2 directors proposed by the unions.

The previous events have been criticised by various sectors of society with arguments that can be summarized as follows:

- The extreme liberalist approach aims to cut the government contribution to TVE by 200 million euros approximately.

- “The [Spanish] Association of Communication Users (AUC) expresses its concern about the budget cuts announced for the RTVE Corporation, which further puts at even greater risk the future viability of the national public broadcasting service in Spain”. [16]
- The politicisation of RTVE continues and unions should not lose their power as some directors should represent their interests.
- The privatisation process is advancing.
- The possibility of pluralism offered by the public institutions is decreasing.

It is important to document the way the ownership of the Spanish audiovisual groups was distributed by September 2012, which is still valid for the summer (July) of 2014. Broadly speaking, the structure of the audiovisual sector was as follows:

Table 3. Main shareholders in the Spanish audiovisual sector (September 2012)

RTVE	Regional TV companies (Autonomous Communities)	Tele 5 / Cuatro / Digital+	Antena 3 group / La Sexta	Imagenio / Movistar TV
Public capital (SEPI)	Public, private and mixed capital	Mediaset España (Berlusconi) (I), Prisa, Telefónica, Liberty Acquisition (USA), Carso (Carlos Slim) (Mexico).	Planeta, Bertelsmann (D), GAMP, Televisa (MX).	Telefónica.

Source: Authors' own creation

It is important to highlight the presence of the American capital since Liberty is the main shareholder in Prisa, with more than 55% of its capital. Carso is minority shareholder in Prisa while the German company Bertelsmann still has a strong presence in Atresmedia and in the summer of 2014 there were rumours want it wanted to increase its influence.

In July 2013, the EU finally approved the financing of the public television corporation through taxes on telecom operators. These operators appealed the decision but in August the EU rejected their appeal. Also in August, the Spanish Advertisers Association (AEA) requested the Spanish government to allow advertising back in TVE, while the Commercial Television Union (UTECA), unsurprisingly, continued to oppose the return of advertising.

On 5 November, the Government of the autonomous community of Valencia (in the hands of the PP) closed down its regional TV network, RTVV (Canal 9), after the Judicial system dismissed its Employment Regulation Plan (*Expediente de Regulación de Empleo, ERE*), which included more than 1,000 lay-offs. In our opinion, the excessive spending on a regional TV network that covers a community of three provinces, plus the crisis, plus the privatisation effort, was what ended with the public regional broadcaster. We are totally against this measure since we undoubtedly support the public television system than the private model. But we also believe that a public company cannot be

maintained with high budget ceilings, which are also unnecessary and influenced by the political ups and downs and the “trafficking of influences”.

The following figure illustrates the configuration of the audiovisual media landscape at the national level in Spain in the first quarter of 2014:

Figure 2. Configuration of the Spanish radio and TV landscape in 2014



Source: Authors' own creation

Atresmedia and Mediaset attracted over 90% of advertising, and hence their refusal to share this “cake” again with TVE [17]. However, on 6 May several DTT channels owned of these groups were closed by a ruling of the Supreme Court, which decided their licenses had been awarded without public tender during the presidency of Rodríguez Zapatero (PSOE) (2010). The free-to-air television offer decreased, particularly for the poorest families, with the closing of Xplora, Nitro and La Sexta3 (Atresmedia), La Siete and Nueve (Mediaset), 2 channels of Net TV (Vocento) and 2 of Unidad Editorial. The public with low income and low purchasing power was left with few options in terms of channels, and Tele 5 was the channel most benefitted by the reduced competition.

Following the ruling of the Supreme Court, a specialised website published the following information:

“After the closing of the 9 DTT channels by the Supreme Court, Diez Romeo y Abogados has published a report that considers that the Government should make a public tender to award the DTT licences again. For the law firm, the configuration of the new bases should take into account the way Italy carried out its imminent public tender for national-coverage DTT licenses”. [18]

The attempt to implement real pluralism to Spanish DTT -as mandated by its legislation- aimed to imitate the Italian system of public tenders of this type which conforms to the guidelines of the European Union. The central objectives of the public tender contests must be:

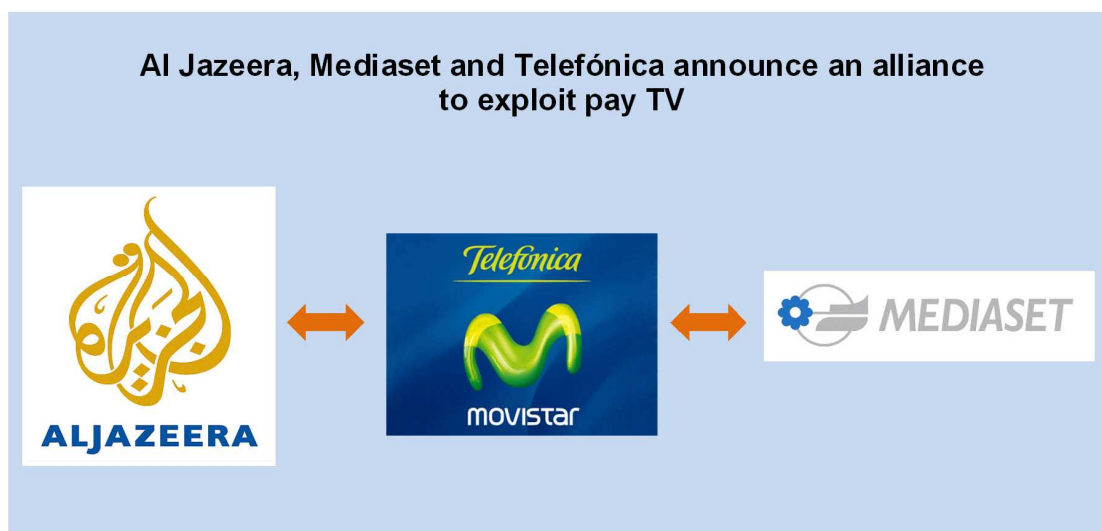
- To benefit small operators.
- To penalise the broadcasting entities already in operations.
- To reflect these regulations by identifying incompatibilities in participation in the following ways
 - Limited participation for groups possessing 2 multiplexes because they cannot aspire to obtain all licenses.
 - Prohibited participation for groups possessing 3 or more multiplexes, since this would favour media concentration.

In June 2014 Prisa announced that it had sold its shares in Canal+ to Telefónica for about 800 million euros. Telefónica got control of 78% of Canal+ while Mediaset España owns the rest, although shortly thereafter (in July 2014) Telefónica also acquired Mediaset’s shares. By the time we were completing this study (August 2014) amazing transformation occurred in the audiovisual media landscape. We can summarise the main changes that took place in June and July in the structure of the private audiovisual media in the following points:

- Prisa announces the selling of its shares in Canal+ (56%) to Telefónica for about 800 million euros.
- Telefonica acquires control of 78% of Canal+ while Mediaset España owns the rest.
- Telefonica wants to buy Mediaset’s shares.
- However, Mediaset also contemplated the possibility of buying Prisa’s shares (56%).
- The final solution is a strategic partnership [19].

As mentioned, the previous events took place in June and July, but, as we can see in the following figure, another crucial event took place in July:

Figure 3. Telefónica in July 2014



Source: Authors’ own creation based on information from <http://www.hispanidad.com/Confidencial/el-gran-objetivo-de-telefonica-en-un-ao-40-millones-de-clientes-de-tel-20140707-163908.html> (7/7/2014) and <http://es.reuters.com/article/businessNews/idESKBN0F70PC20140702>, (2/7/2014).

“Days after purchasing 100% of Canal+, Telefónica announced its entrance, with 10%, to Mediaset Premium. In other words, it [Telefónica] became part, as partner, of the large model of pay TV that Silvio Berlusconi had launched in partnership with Qatar’s Al Jazeera, with

the objective of creating the most important pay TV network in Europe, perhaps in the world, as a large purchase central of broadcasting rights. The objective is to achieve in one year 40 million pay-TV subscribers (Canal Plus contributes 1.6 million subscribers). The key content will be football, and other major sports, in addition to film. The technical instruments are optical fibre cable and satellite technologies.” [20]

Telefonica’s justification of the operation was as follows: “fixed telephony is not giving us money and mobile telephony is giving less and less, while Internet still holds but only with a strong optic fibre investment. At the end, it is television which generates loyalty through the offers of quadruple play: all in one and in the entire perimeter of the operator (...). While in Europe the pay TV model will be the one currently in force, in Latin America the option can be available through pre-payment, which is harder to fit into the quadruple play services.”

What happened during this time in the public audiovisual sector, and in RTVE in particular? In July, 2014:

“RTVE considers the possibility of downsizing its staff of 6,400 workers with voluntary redundancy. The extra injection of 130 million that RTVE has received through SEPI -its main shareholder- represents a commitment of the Corporation to enhance its efficiency plan to save costs. Among the measures, in addition to the closure of Teledeporte, is the consideration of voluntary redundancy plan. In this efficiency plan, the Corporation also proposes to reduce the direction and management structure by 5% and the operative staff by up to 16%. In 2006, the then public entity RTVE implemented an Employment Regulation Plan (ERE), which included laying off 4,150 workers over 52 years of age and paying them 92% of their salary until they reach retirement age. Since then, the government allocates a budget for the public corporation to cover severance payments. In 2014, the allocation approved for this purpose in the General State Budget was 31 million.” [21]

At the same time, in July 2014 the executive committee of TVE presented a report of their management, from which the media highlighted the following points:

- José Ramón Díez [director of TVE]: ‘the suppression of advertising has weakened to TVE’.
- Leopoldo González-Echenique, President of the Corporation, estimated the losses of the network at 716 million euros.
- Díez defends the idea of “offering a quality public service even if it is at a loss” and has affirmed that his first objective will be “to try to recover the audience shares and to be close to the private channels but without competing with them”.
- In recent seasons, the public broadcaster has been surpassed by private channels like Telecinco and Antena 3, and even lost over five points of audience share in 2011. [22]

Indeed, as pointed out by García Santamaria, Pérez Serrano and Alcolea Díaz (2014), who have studied the formation of the Mediaset España-Atresmedia audiovisual duopoly in Spain: “the evolution of the audiences across business groups indicates –based on data from 2012– that Mediaset España has reached a 28.1% audience share, followed by Atresmedia with 25.8%, and CRTVE with 18.9%. The most remarkable thing is that both private groups have increased their share in comparison to 2011, while CRTVE has decreased from 22.3% to 18.9%.”

The situation was substantially the same in 2014. In July the audience was 32.6% for Mediaset España, 25.8% for Atresmedia and 16.3% for TVE [23].

So far we have made observations about the configuration of the audiovisual sector in Spain, and focused on the developments of recent years. Now we will offer an outline of the developments made in terms of content through a case study: Canal Sur TV.

5. Results. The case of Canal Sur TV: an approximation

Canal Sur TV is going through a bad time in terms of the audience shares it enjoyed in other times, more than 20%. However, in 2013 and 2014 its position has fallen considerably. In fact, all the “historical” regional television channels that were launched in 1980s have seen their popularity decreased (the closure of Canal 9 is well known). Only Aragon TV, which is a relatively new player in the regional audiovisual landscape, and, to a lesser extent, Extremadura TV have experienced a notable increase in terms of audience share.

Figure 4. Audience shares of the regional TV channels in 2012 and 2013

	2012	2013*	Difference in points	Percentage Difference	
AUT	9.8	8.7	-1.1	-11.2	AUT
TV3	14.3	13.5	-0.8	-5.6	TV3
ARAGON TV	11.3	11.5	0.2	1.8	ARAGON TV
TVG	11.5	10.9	-0.6	-5.2	TVG
C.SUR	10.1	9.9	-0.2	-2.0	C.SUR
ETB2	9.9	9.6	-0.3	-3.0	ETB2
TVCAN	7.6	7.2	-0.4	-5.3	TVCAN
IB3	6.3	5.9	-0.4	-6.3	IB3
TPA	6.9	5.4	-1.5	-21.7	TPA
C.EXTREM.TV	1.5	4.5	3	200.0	C.EXTREM.TV
CMT	5.1	4.4	-0.7	-13.7	CMT
TELEMADRID	5.3	3.8	-1.5	-28.3	TELEMADRID
C9	5	3.7	-1.3	-26.0	C9
ETB1	2.1	2.1	0	0.0	ETB1
SUPER3/33*	1.6	1.7	0.1	6.2	SUPER3/33*
ESPORT3	1.1	1.4	0.3	27.3	ESPORT3
3/24	1.3	1.2	-0.1	-7.7	3/24
TVG2	0.9	0.9	0	0.0	TVG2
ETB3	0.9	0.9	0	0.0	ETB3
LAOTRA	0.9	0.7	-0.2	-22.2	LAOTRA
TPA2	0.8	0.7	-0.1	-12.5	TPA2
7RM	2.5	0.5	-2	-80.0	7RM
NOU24	0.3	0.4	0.1	33.3	NOU24
NOUDOS	0.4	0.2	-0.2	-50.0	NOUDOS
TVCAN2	0.5	0	-0.5	-100.0	TVCAN2
CS2	1	0	-1	-100.0	CS2
AUT PRIV	0.9	0.8	-0.1	-11.1	AUT PRIV
8TV	3.2	3.4	0.2	6.2	8TV
CYLTV	1.6	1.5	-0.1	-6.3	CYLTV
La 8	0.8	0.6	-0.2	-25.0	La 8
8MADRID	0.7	0.6	-0.1	-14.3	8MADRID
V TELEVISION	0.6	0.4	-0.2	-33.3	V TELEVISION
A3 CANARIAS	0.9	0.3	-0.6	-66.7	A3 CANARIAS
NUEVE TV	0.4	0.2	-0.2	-50.0	NUEVE TV
RAC105	0.2	0.2	0	0.0	RAC105
ESTIL9	0.1	0	-0.1	-100.0	ESTIL9

SUPER3/33: Data for 2012 is the average since its creation on 1/10/2012

Source: Partially translated version of the table created by *Barlovento Comunicación* with data from Kantar Media. Original table available at: <http://www.formulatv.com/noticias/35021/tv3-cierra-2013-cadena-autonomica-lider/> (consulted on 8/1/2014).

The budget of Canal Sur TV in 2013 was as follows:

- Total: € 190 million (approximately).
- Spending on payroll: 90 million.
- Spending on outsourcing: 70 million.
- Others (spending on technology, hiring of antennas and other services): 30 million.
- Workforce of RTVA in 2012: 1,600 workers.

By the end of the first quarter of 2012, the public debt of Andalusia had reached 15,373 billion euros, which is the equivalent of 10.6% of the GDP of this Autonomous Community and is 2.9 points lower than the average of the autonomous communities [24]. An adjustment was necessary. On 4 September the press announced that the Director General of RTVA, Pablo Carrasco, unveiled to the parliamentary control committee that the second channel (Canal Sur 2) would eliminate its programming to save 20 million euros by the end of 2013.

The network reduced its number of vehicles from 200 to 40. The salary of the Director General (Pablo Carrasco) decreased 54%. His salary in 2012 was 120,000 euros per year. In May 2009 the Director General of the Andalusian TV network earned 139,345 euros annually, 60,000 euros more than the President of the Government of Andalusia, José Antonio Griñán, who was earning 81,155 euros a year, which is 72% less than Carrasco. The spending in the outsourcing of services was 70 million euros. [25]

Since 2009 the contribution of the Government of Andalusia has been reduced by 33%, and advertising investment is almost just one-third of what it used to be. “Carrasco, who during his speech at the Parliament of Andalusia lamented that the contribution of the government to RTVA is lower than that given by the rest of the autonomous regional television networks, has indicated that commercial revenues in 2012 amounted to 39 million, compared to the 52,6 million earned in 2008. With regards to the contribution of the regional Government, it decreased from 180 million in 2009, to 122 in 2012”. [26]

From October 2012 the programming of Canal Sur was squeezed together in a single channel and some ‘historical’ contents of this autonomous channel, like the South American telenovelas, disappeared. Since this month, Canal Sur 2 simultaneously offers the signal of Canal Sur, with adaptations for disabled people. Greater presence is given to in-house productions, especially to news programmes.

The cut to the budget was of 20%. The programme *La tarde, aquí y ahora* (“The afternoon, here and now”), hosted by Juan y Medio, has been on air for three years and has suffered three strong cuts since the beginning of 2009. The cut of 2012 caused the following: downsizing of staff, reduction in contracts with providers (reduction of antenna technicians, cafeteria services, makeup hours, etc.) and reduction in staff salaries.

Some programs attempted to maintain their structure, although, for example, live connections were reduced because the new budget was not enough to cover the expenses of all the mobile units. The star show *Se llama copla* (“Its name is popular song”) had to change its content while other shows, like *75 minutos* (“75 minutes”), even had to change their presenters (whose fees are very different).

However, according to official data, the 2012-2013 programmes were well received by the Andalusian population, reaching audiences of 400,000 (news programmes) 470,000 (the last season of the telenovela *Myrtle*) and one million (*Tiene arreglo*, *La tarde aquí y ahora* and *Se llama copla*). In Andalusia, the network reached 17% the audience in October 2012. [27]

By 2014, Deputy Director-general of Radio Television de Andalusia, Joaquín Durán, unveiled the new programming catalogue of Canal Sur Television, with 90% of in-house productions. The offer of the new season was summarised in the following way:

“The main novelties of this season include the renovation of the emblematic show “*Tiene Arreglo*” [“It can be fixed”], now presented by journalist Fernando Díaz de la Guardia; “*Cerca de Ti en Andalucía*” [“Close to you in Andalusia”], which is a show based on emotions and surprise and presented by the well-known singer Merche; the redesign of the Tuesday night slot which becomes “*Noche 360*” [“Night 360”], which is the fusion of the journalistic shows “*75 Minutos*” [“75 minutes”] and the new “*@Debate*”, which is interactive and very participatory, hosted by journalist Rafael Fernández; the new fiction series “*El Faro*” [The lighthouse], co-produced with other FORTA networks, in a syndicated effort to maintain this TV genre in the autonomous regional television networks; and the new show “*Lo Flamenco*” [All things Flamenco], which will abound on the features of the most known Andalusian artistic genre.” [28]

However, in our opinion, Canal Sur TV faces a series of challenges that must be considered:

- It must carry out an in-depth self-criticism, after being under the administration of one-party government since 1982 (PSOE).
- It must really apply the progressivism it claims to already implement. This means, for example, to counteract the views of the topical Andalusia and stop focusing on reaching the audience sector that is part of the superficial Andalusia just because it constitutes the largest audience sector.
- It must put professionalisation before politicisation.
- It must control its “anything goes” attitude (to protect children).
- Canal Sur TV broadcast bullfighting in the children’s time slot. There is no specific legislation against these broadcasts but sensitivity and ethics should prevail.
- Canal Sur TV broadcasts advertising during children’s programming (*La Banda del Sur*).
- It must recover its audience. In 3 years the channel has lost 38% of its audience, much of it young.

However, the existence of Canal Sur TV involves the existence of an audiovisual media industry in a large part of Andalusia, although in this Community there are also production companies linked to the cultural industries centralised in Madrid. The following table shows some of the production companies that worked for Canal Sur in 2013 (and still do in 2014) and the programmes they produced.

Table 4. Important audiovisual production companies working for Canal Sur TV (2012-2013)

<ul style="list-style-type: none"> • Linze televisión. In <i>Linze televisión. Endemol.</i> “Arrayán” • Andalucía Digital Multimedia. “Tiene Arreglo”, “Andalucía Directo”, and “La respuesta está en la Historia.” • Grupo ZZJ. “Diez Razones” and “Menuda Noche” • Mettre. “Salud al Día” and “Tecnópolis.” • Europroducciones. “Se llama copla”. • Caligari Films. “Se llama copla”. • Indaloymedia. “La Tarde, aquí y ahora”. • Productora Itaca. “La Tarde, aquí y ahora”. • Producciones Cibeles. “75 minutos.” • Pulso TV (Grupo Secuoya). “Yo, Médico”. • Producciones La Séptima. “Cómetelo”, “El club de las Ideas” and “Destino Andalucía.”
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Source: Sánchez-Gey Valenzuela, Nuria (2012): *audiovisual structure and reporting in Andalusia: the production company Indaloymedia (2008-2012)*, dissertation/thesis, Universidad de Sevilla, directed by Ramón Reig.

On the other hand, the following table shows the presence of non-Andalusian production companies that worked for Canal Sur TV:

Table 5. Non-Andalusian companies that produce audiovisual products for the Andalusian people (2012-2013)

<ul style="list-style-type: none"> • “La mañana de La1.” Medina Media • “Espejo público.” CBM and Mediapro • “El programa de AR”. Cuarzo producciones • “Las mañana de Cuatro”. Plural entertainment and Prisa group • “España directo.” Mediapro and Medina Media • “Tal cual lo contamos.” Plural entertainment • “3D.” Medina Media.

Source: Sánchez-Gey Valenzuela, Nuria (2012): *Estructura audiovisual y reporteroismo en Andalucía: la productora Indaloymedia (2008-2012)*, Thesis, University of Seville, directed by Ramón Reig.

The previous table is a clear example of outsourcing, that kind of magical and sometimes controversial word that has produced such good results for Aragon TV.

6. Conclusions

Society does not need public television and radio networks that are manipulated and politicised or act guided by the desire of obtaining a possible captive vote. Society neither needs public television networks that do not fully respect the rights of children, because private television already violates these rights permanently.

The official discourse of the market indicates that:

- Public TV is making losses.
- Public TV is outsourcing work in excess (first the autonomous regional networks and now also TVE). “It has been reported that TVE will not be the one to capture and distribute the images of the coronation of the new Kings of Spain [Felipe VI and his wife Letizia] on 19 June [2014]. It was the public corporation itself which informed that it would be Telefónica Servicios Audiovisuales, who will offer those images, even to TVE. Moreover, the public broadcaster affirms that it was a “unanimous decision” taken by Congress and that it [Telefónica] is expected to provide the signal to other networks free of charge”. TVE points out that “Telefonica will capture the images within Congress, but we will take care of capturing and distributing the images of the tour that will take place after the new king has been crowned”. Meanwhile the representatives of the Corporation’s workers point out that the equipment of the public network is superior than that of Telefonica, which only has SD cameras, while RTVE has at its disposal HD and 4K cameras, and has superior human and technical resources than Telefónica. The rumours of outsourcing are getting stronger.” [29]
- Public TV maintains a high percentage of managers in contact with editors and other communication professionals.
- Private TV generates benefits. But at the expense of what?
 1. At the expense of breaching the legal limits of advertising contents.
 2. At the expense of downsizing staff continuously.
 3. At the expense of lowering the average cost of production.
 4. At the expense of using a despicable system of contracts.
 5. At the expense of very long working hours.
 6. At the expense of sacrificing cultural and children and youth programming.
 7. At the expense of broadcasting proven formulas that guarantee ratings without worrying at all about the meaning of “public service”, which should focus on education and not on satisfying the most basic human instincts.
 8. At the expense of passing advertising for news or journalism.
 9. At the expense of sacrificing newscasts in favour of entertainment shows.
 10. At the expense of limiting or eliminating union rights.

Therefore, our position is that we critically support public television not only in Spain but in the rest of the world. In what refers to Europe, public television is even a sign of identity.

The structuring process of television in Spain has resulted in a duopoly which involves a clear “punishment” on public television, which an expected outcome in this global and national context defined by the so-called free market which in this case allows large media groups to form alliances with other production sectors non related to media and communications, to the detriment of a genuine pluralism.

7. Notes

1. See:

<http://www.forta.es/FortaComercial/DatosdeaudienciaSharetelevisionesautonomicas/tabid/203/Default.aspx#graf>, consulted on 1/8/2014

2. For the purposes of this study, we want to highlight the works that offer a general view. Partial, focused or very limited views can be found in specialized academic journals and professional magazines, such as *Noticias de la Comunicación*.

3. Here it is important to note that in 2005 Punto Radio (Vocento) was launched, which contradicted the predictions of some studies which indicated that it was impossible to maintain more commercial radio stations than those already existing (Onda Cero, Ser, Cope). It is not surprising that in 2013 this station was closed and was largely absorbed by Cope.

4. Bought Rayet (construction) in 2008. In September 2009 it sold 3% to an unnamed investment group.

5. In the summer of 2009, Vocento sold its 5.1% in the stock market.

6. The ownership of the private TV in Spain has gradually been stimulated by the government. In 1989 the Spanish Private TV Law established a ceiling of 25% in the ownership of a private channel, but in 2009 the same company was allowed to 100% of a private television channel.

7. GAMP: 70% owned by Imagina (Árbol + Mediapro); 9.8% by Caja de Ahorros de Bilbao y Vizcaya; 8.25% by El Terrat (Buenafuente); 12% by Baint Media (Karlos Arguiñano).

8. *Diario de Sevilla*, 1/6/2010, see www.formulatv.com

9. www.prnoticias.com, 07-20-10.

10. www.elmundo.es, 9/23/2010.

11. www.elmundo.es, 30-12-2010.

12. www.elpais.com, 30-12-2010.

13. www.elmundo.es, 30-12-2010. www.elpais.com, 12-30-2010.

14 <http://www.elmundo.es/elmundo/2012/08/21/comunicacion/1345545557.html> and <http://www.elmundo.es/elmundo/2012/08/29/comunicacion/1346259664.html>

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