The Industry Practices Behind the Presence of Imported Television Content: A Comparative Study of Spain and the United Kingdom

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LIST OF COUNTRY ABBREVIATIONS

AT	Austria
AU	Australia
BE	Belgium
CA	Canada
CO	Colombia
DE	Germany
DK	Denmark
EG	Egypt
FR	France
IE	Ireland
IN	India
IT	Italy
JP	Japan
KR	South Korea
MY	Malaysia
NL	The Netherlands
NW	Norway
NZ	New Zealand
PY	Paraguay
RU	Russia
SE	Sweden
SG	Singapore
SP	Spain
TR	Turkey
UK	United Kingdom
US	United States
UY	Uruguay

ABSTRACT

This research analyses the practices followed by television buyers at local broadcasting corporations when purchasing programmes from the international marketplace to incorporate in their schedules. Technological convergence has made it possible for the speed and volume of transnational television flows to increase exposing the European television sector to a high volume of international programmes available through multiple platforms. However, traditional broadcasters are still at the centre of these cultural exchanges having a direct social impact in their markets.

This comparative study focuses on the general-interest channels of Spain and the United Kingdom assuming their active role as cultural intermediaries between the forces of the transnational market and the interests of local viewers. In order to display the industry practices followed by the broadcasters, the Acquisitions Executives of the corporations were interviewed. In addition, a content analysis of the schedules was made to quantify the presence of imported content and outline the logic behind the scheduling of these programmes.

The results show that Spain has a higher dependency on the international television market than the United Kingdom. Nevertheless, all local broadcasters from both markets follow the same process when acquiring content from the international market. This process can be divided between the stages of selecting the programmes and the negotiations with the international distributors. Furthermore, the factors taken under consideration by the executives are the same in both countries, which creates a high level of standardisation in the decision making process. This standardisation homogenises the international content aired by the channels and limits the range of programmes that audiences are exposed to on the generalist television channels.

RESUMEN

Esta investigación analiza las prácticas seguidas por los ejecutivos de producción ajena de las corporaciones locales de televisión durante el proceso de adquisición de contenidos en el mercado internacional para incorporar en sus programaciones. La actual convergencia tecnológica ha hecho posible que la velocidad y el volumen de los flujos televisivos transnacionales aumenten favoreciendo la exposición del sector televisivo europeo a una gran cantidad de programas internacionales disponibles a través de múltiples plataformas. Sin embargo, los canales tradicionales siguen estando en el centro de estos intercambios culturales teniendo un impacto social directo en sus mercados.

Este estudio comparativo se centra en los canales generalistas de España y el Reino Unido asumiendo su papel activo como mediadores culturales entre las fuerzas del mercado transnacional y los intereses de los espectadores locales. Para mostrar las prácticas seguidas por los corporaciones televisivos, los ejecutivos de producción ajena de cada empresa han sido entrevistados. Además, se ha realizado un análisis de contenido de las programaciones de los canales televisivos para cuantificar la presencia de los contenidos importados y esbozar las lógicas programáticas detrás de estos programas.

Los resultados muestran que España tiene una mayor dependencia del mercado internacional que Reino Unido. Sin embargo, todas las corporaciones locales siguen el mismo proceso al adquirir contenido del mercado internacional. Este proceso se puede dividir entre las etapas de selección de los programas y la negociación con los distribuidores. Además, los factores considerados por los ejecutivos son los mismos en ambos países, lo que genera un alto nivel de estandarización en el proceso de toma de decisiones. Esta estandarización homogeniza el contenido internacional emitido por los canales y limita la variedad de los programas a los que las audiencias están expuestas en los canales de televisión generalistas.

INTRODUCTION

International television programmes have been a significant part of the European television schedules since the early 1960s when technology made it possible for the establishment of fluent exchanges between countries. Local viewers have been exposed from imported Fiction to Factual Entertainment in more recent years having an inevitable social and cultural impact. These cultural exchanges have been thoroughly analysed over the years and have even been at the centre of international political discussions on platforms such as UNESCO, particularly during the 1970s and 1980s. However, despite cultural exchanges increasing in recent years as a consequence of technological possibilities, the number of studies on this subject has decreased in the digital era.

The current situation has generated a multiplatform context that enables immediate universal access to audiovisual content from all over the world, increasing the speed and volume of transnational television flows and directly influencing the industry practices behind television programme exchanges. For example, despite there being limits in local television markets, the permeability of state borders has increased, which questions the validity of the policies designed to prevent high levels of foreign programmes. Additionally, it challenges the parameters of the television sector in itself by merging with other creative industries.

Furthermore, the diversification in audiovisual consumption has produced major changes. Before digitalisation, television channels and movie theatres were the only intermediaries between international programmes and local audiences. However, nowadays audiences can have direct access to practically all global content. Despite this, linear television still remains as the dominant medium in European markets with the power to establish trends and, specifically, to have a direct impact on the international programmes that local viewers consume.

Transnational television flows of canned content, "those TV programmes that receive no or only minor adaptation (subtitling, voice over, or dubbing) when imported" (Esser, Bernal-Merino, & Smith, 2016, p. 222), have been mainly analysed by their quantitative presence in local markets highlighting the hegemonic dominance of certain territories, mainly the US. The majority of these studies have criticised the use of media to control territories with lower level of economic strength, especially during the 1960s and 1970s. The main paradigms aligned with this idea were media imperialism (Boyd-Barret, 1977; Schiller, 1969, 1976; Tunstall, 1977) and the dependency theory in Latin America (Dorfman & Mattelart, 1975; Salinas & Paldan, 1979). However, in the 1980s some scholars and politicians also started to criticise the presence of US content in the European schedules due to the growing dependency on that market and the success of shows like *Dallas* and *Dynasty* across the continent (Blumler & Hoffman-Riem, 1992; Collins, 1986; DeBens, Kelly, & Bakke, 1992; Pragnell, 1985; Sepstrup, 1990; Silj & Alvarado, 1988). This accelerated the proposal of having a shared minimum regulatory framework on the European Union to protect the local television industries economically and culturally.

On the other hand, another trend that analyses the transnational television flows has studied the cultural and social effect of those imported contents on local audiences. Scholars aligned with imperialism paradigms have raised concerns about the homogenisation of cultures due to the imbalances of the flows. Others, highlighting the signs of heterogeneity, have defended the active role of viewers considering that culture influences how individuals understand audiovisual programmes (Ang, 2001; Gripsrud, 1995; Liebes & Katz, 1990; Naficy, 1993; Stehling, 2013; Varan, 1998; Vassallo de Lopes, 2008).

Nevertheless, the focuses of these research projects have constantly overlooked the role that local television corporations have in deciding what to acquire for their channels. Alternatively, the overwhelming forces of the international audiovisual flows have been assumed. However, there are established practices in the television industry which condition the type of international programmes that channels broadcast. These practices directly affect the imported programmes scheduled regarding aspects such as genres or the countries where the programmes are purchased. Consequently, they have a direct impact on the international programmes local viewers consume. In addition, the role Acquisitions Executives of local media corporations have as cultural intermediaries between the pushes of the transnational television market and the interests of local viewers (Bourdieu, 1984; Havens, 2006; Kuipers, 2012; Negus, 2002) has also been traditionally considered secondary despite its importance on transnational flows.

We believe that the current context does not decrease the importance of studying cultural exchanges. It demands a thorough analysis to understand middle-range processes and study how traditional broadcasters fulfil and adapt their practices when acting as transnational cultural intermediaries in the multiplatform era.

This thesis assumes that local corporations play an active role when selecting and purchasing foreign content to be scheduled on their channels. From all the programmes available in other television markets, they chose some and discard the rest following a process to actively decide which imported programmes meets best their needs. These steps will be referred to as the acquisition process.

The main objective of this study is to unveil the industry practices behind the acquisition process of canned international television content in the Spanish and British markets. This comparative analysis is focused on the main general-interest channels of each market accounting for twelve channels belonging to eight different broadcasting corporations. The focus on linear generalist channels is because of their higher audience reach and their aim for mass-appeal.

The selection of these two markets for the comparative analysis is due to three key similarities between them: they are two of the main European television markets; they have two of the most spoken languages worldwide; and they have generalist public and commercial channels, with the public channels broadcasting without advertising.

From this general goal, five specific objectives have been set:

- Objective 1: Explain the role played by Acquisitions Executives as cultural intermediaries.
- Objective 2: Highlight the level of dependency of Spain and the UK on the international television market through the presence of imported programmes in the schedules of the main general-interest channels.
- Objective 3: Analyse the differences between public and commercial channels during the acquisition process.
- Objective 4: Recognize the strategies traditional broadcasters utilise to acquire imported content for their online platforms.
- Objective 5: Research how the changes in the television context of digitalisation and the appearance of new players like Video on Demand services have affected the acquisition process of traditional broadcasters.

To fulfil these objectives two different methodologies have been used. Firstly, a quantitative content analysis of the channels included in the sample was conducted, which consisted of the analysis of the schedules of one regular week of season 2014-2015. This data has allowed us to create a picture of the presence of imported programmes in Spain and the United Kingdom and compare it across channels and types of ownership. Secondly, in order to understand the acquisition process and comprehend the reasons behind television flows, we have interviewed the Acquisitions Executives of the sample corporations, who are in charge of making these decisions.

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Outline of the chapters

This dissertation is structured into four main sections. The first part is the **Theoretical Framework** consisting of four different chapters that explain and contextualise the presence of imported content in Spain and the UK and the role of Acquisitions Executives.

- Chapter 1: Television flows
  Displays the academic discussions regarding transnational television flows throughout the years, recognising the concerns in respect to the effects on local cultures and identities. The distinct theories are divided between those considering that the exchanges tend to the homogenisation of societies and those defenders of heterogeneity.
- Chapter 2: The acquisition process
  This chapter explains the different segments of the audiovisual content value chain that are linked to the acquisition process, especially the exhibitors and their executives, which are the main focus of this dissertation. In addition, the role of Acquisitions Executives as cultural intermediaries is thoroughly analysed.
- Chapter 3: Scheduling: From linear to catalogues
  This section is devoted to the theoretical discussions with respects to the function of schedules in the current multiplatform context. First, considerations of the scheduling of traditional broadcasters on linear and catch-up television are made. Second, the evolution of imports in the schedules of the samples is emphasised.
- Chapter 4: European and local content quotas
  In the last chapter of the theoretical framework, the media policy concerning the presence of local and imported programmes in television schedules is outlined, with a particular focus on the content quotas that have to be fulfilled in each market. This information is divided into two different levels: European legislation and the local policy of Spain and the UK.

The second part of this dissertation is dedicated to the **Methodology** and delves into the approach adopted for the designed methodology and the phases of the fieldwork. Chapter 5 also displays the sample of the study and the considerations for its selection.

The **Results** are divided into four chapters that cover the different elements and objectives of concern in this dissertation regarding the acquisition process:

- Chapter 6: Imported contents in the Spanish and British markets
  The first section of the results aims to disclose the main aspects of the presence of imported content in the schedules of the sample and the general differences between countries and types of ownership when airing these programmes.
- Chapter 7: The acquisition process of local broadcasters
  The steps followed by Acquisitions Executives when purchasing foreign programmes are displayed in this chapter, with the main division between the selection of the content and the negotiation with the distributors. Additionally, the organisational chart of the Departments of Acquisitions of each corporation is overviewed.
- Chapter 8: Selection of imported programmes
  This chapter comprises the different factors that influence the decision of local executives when choosing which international content to purchase. First, the main factors are considered, They have been divided between internal, intrinsic to each corporation, and glocal, which mediates the forces and shared standards in the international market and the interests and characteristics of the local market. Second, the importance of international television fairs for local executives and the current impact on their decisions is discussed.
- Chapter 9: Negotiations with international distributors
  The final part of the results centres on how local broadcasters negotiate with international distributors to acquire the rights to air the foreign programmes. The main negotiation terms discussed are explored explaining the characteristics of both markets and the specifics of the channels.

The final section is **Conclusions**, which reflects on the main findings of this thesis regarding the industry practices that local broadcasters follow when acquiring imported programmes and the comparison of the dependency on the international market of the countries in the sample.

THEORETICAL FRAMEWORK

1. TELEVISION FLOWS

We live in a world of flows. No aspects of our societies are static, instead they all move within and across communities. These movements include flows of “ideas and ideologies, people and goods, images and messages, technologies and techniques” (Appadurai, 1999, p. 230). As early as the 1990s, Lash and Urry (1994) commented that the many varieties of flows made social science researchers as diverse as economists, demographers or media scholars, are all related to flows. In recent decades, technological advances have made it possible for these flows to increase their speed and depth. Thus, currently there are more flows and in more directions.

Communication flows in particular play a significant role in what has been named the ‘Information Age’ (Castells, 1997). According to Castells, these flows are fundamental in comprehending current societies, culture and identities and therefore, they help to acknowledge and understand the other flows. In addition, it should not be overlooked that all flows have direction and their impacts are not equal. Communication and television flows also have direction despite losing nothing from their origin whereas in foreign territories something is gained (Hannerz, 1997, p. 5). This concept will be used to affirm that local markets do not work independently and imported programmes are not only relevant in local schedules but are part of the flows that work across territories.

This dissertation focuses on canned television flows, a type of communication flow, and how international television programmes are selected and incorporated into local territories. The digitalisation of content and the new players in the audiovisual sector, such as Over-The-Top (OTT) services, are helping to increase these television flows and elicit deep changes in television markets and the practices of traditional broadcasters.

In this chapter, firstly the relationship between television, culture and identity will be discussed. Secondly, the relationship between transnational flows and local cultures will be analysed, studying the visions of scholars through the years from the homogenisation tendency to the defenders of heterogeneity.

1.1. Researching television flows

Transnational media flows have been of interest since the beginning of the 1960s, when technology made it possible for the amount of exchanges to significantly increase. The impact of these exchanges has been seen from different and opposing points of views and the presence of this type of content in local schedules, especially the high proportion at some points in broadcasting history, has not always been welcomed. Scholars, politicians and public institutions have argued over media flows mostly due to social and cultural concerns.

The imbalances of television flows, especially the presence of Western programmes around the world and sometimes only from the United States (US), have been mainly studied from two different paradigms. On the one hand, Cultural Studies researchers have focused on the effects and implications on culture, identity and audience preferences. On the other hand, political economy scholars have emphasised the relationships of power and capital in the cultural industries that influence international media flows (Havens, 2006).

1.1.1. Cultural studies

Cultural Studies initiated in Europe, specifically in the Centre for Cultural Studies of Birmingham University, in the late 1950s and the beginning of the 1960s. This paradigm considered culture as a broad concept which included aspects such as language, art and mass media (Castelló, 2005). Stuart Hall, in 1980, explained that despite cultural studies not having a common theoretical statement, they all have a unified objective: to study cultures and societies in a non-reductionist manner. In this sense, cultural studies avoided quantitative methodologies and sociologist empiricism to embrace qualitative research. The umbrella of cultural studies started a great deal of research on gender, race, social classes, mass culture, etc.

Mass media, included in the broader definition of culture, is one of the main topics of cultural studies, specifically, the ideological functions of mass media and its cultural role (Grandi, 1992). According to Casetti and Di Chio (1999) television research conducted under the cultural studies paradigm has three main concepts: the importance of the context (historical, geographic, cultural and social framework); the text-context interconnection (texts influence the social and cultural context and identities and vice versa); and the cultural decodification (directly linked to Hall, 1980). In contrast to the

American functionalist paradigm, cultural studies considers the role of audiences as active with the highly cited text of Stuart Hall, *Coding and Decoding* (1980), setting the basis for the understanding of audiences by this paradigm.

The main topic analysed by cultural studies scholars regarding transnational flows is how international television programmes are received by the local viewers and what the impact is. Some of the most relevant works are Ang (1982), Featherstone (1991), Fiske (1987, 1992), Liebes and Katz (1990) and Morley (1980). These studies concluded that the interpretations of media messages are not hegemonic among countries but are influenced by the social and cultural context.

1.1.2. Political economy

The other paradigm that has extensively studied the international television flows is political economy. Again, scholars working under this theory do not have a homogeneous point of view but they have a common opinion on which aspects of mass media have to be considered when doing research. According to Mosco (1996), this paradigm puts the focus on not only the economic factors but also who controls the processes of production, what quantifiable value cultural products have and their international organization. This theory has a Marxist parallelism and originated in order to redress the functionalist tendency from the US, the rise of cultural studies and the neoliberal theories.

In Europe, Murdok & Golding (1979) wrote a fundamental text in understanding political economy in which they criticise cultural studies for only focusing on the cultural aspects and excluding economic and power factors from their analysis. They consider that the forces of production are indispensable when analysing media due to its intrinsic ideology, which directly affects cultural products. At the same time, they defend themselves from those who accuse them of being economically deterministic because they consider that the study of production is not enough to study mass media. "Among the main topics of study of political economy is the industrialization of media, ownership concentration, internationalization and globalisation, the emergence of alternative media and the expansion of the state as a producer, distributor and regulator of communication" (Castelló, 2005, p. 54).

One of the main scholars of the political economy paradigm is Herbert Schiller, who was greatly concerned with international television flows and their consequences, as will be discussed in the following sections. The situation of cultural imperialism in world relationships, where Western countries were using media to dominate weaker territories, began to be denounced in the late 1960s (Schiller, 1969).

1.1.3 Middle-range approach

With no intention of delving into these two paradigms but with a focus on how they have studied and understood television flows, we can argue that an intermediate perspective of cultural studies and political economy will be used as in Havens (2006) or Meehan (1999). Therefore, a middle-range approach (Merton, 1968) allows us to situate our research “between political economy and micro-situational reception studies” (Sinclair, Jacka, & Cunningham, 1996, p. 22).

In this dissertation we will focus on the industry and especially the industry executives in charge of deciding which foreign programmes to broadcast in the local market, emphasizing the production practices but also the cultural and social factors influencing their decisions. In addition, the scheduling of international programmes on local channels will be studied, considering television programmes as cultural and economic goods.

1.2. Local cultures and identities

Both cultural studies and political economy paradigms agree that mass media, and in particular television, have a direct connection to culture and societies. When international flows are studied, it is assumed that these imply a cultural exchange because a relationship between television consumption (media in general) and cultural and identity aspects is presupposed. Thereafter, the concerns about the internationalization of television are because local identities and local cultures sometimes are perceived as being under threat (Crofts Wiley, 2004).

However, the concepts of culture and identity have to be questioned due to the preconceived ideas that they hold. On the one hand, culture has been related to two different concepts in its multiple definitions: culture as cultural and artistic productions and culture as a way of life (Castelló, 2005). This second concept, which understands culture as a much broader concept (including the first definition), is assumed when studying television flows. It has also been expressed as a repertoire of patterns of meaning (Geertz, 1973) or a “repertoire of beliefs, styles, values and symbols” (Smith, 1990, p. 171).

Another more complex definition was proposed by Bourdieu within its framework of economic, social and cultural capitals:

> Culture is physically and spatially as well as socially constructed, whether in regard to the economic basis of people's lives, the regions and places they inhabit, the symbolic meanings of the world they create, the way they represent themselves through dwellings, or the visual markets they use to communicate meanings (1977, p. 214).

These ways of understanding culture are also in line with the definition of cultural studies, which includes mass media as part of the concept of culture. Fiske, within this paradigm, defined it as "a way of living within an industrial society that encompasses all the meanings of that social experience" (1992, p. 284).

On the other hand, identity can be divided into individual and collective identities (Schlesinger, 1991, 1997). However, the sense of belonging to a group is not the reflection of the individual identities in the community but collective identities are socially constructed (Castelló & Coller, 1999). Furthermore, these identities are recognized because of the distinction between the notions of *them* and *us*. McQuail described it as "a group's sense of belonging to a particular collectivity with shared attributes (of place, language or culture) and a sense of exclusivity" (1992, p. 264).

The two terms of culture and identity are directly related, since culture is created by the way of life of subjects who have individual identities as well as collective. At the same time, culture shapes the evolution of identities. Thus, culture does not exist without identity and each subject needs culture to create and shape their identities. Furthermore, this mutual connection determines that cultures and identities are never static elements and are in fact in constant reformulation.

Television, also included in the concept of culture, has the power to create and transform identities and cultures. However, it is not the first form of media to create and influence a sense of group or community. Anderson (1983) argued that print media, newspapers and novels were the main reason for the exaltation of nationalism, together with the increase in literacy and capitalism during the eighteenth and nineteenth centuries, because they facilitated a way to create imagined political communities. They are imagined because even though there are no direct connections with all members they all have the notion of being part of the same group.

Anderson argues that before print media, the idea of community was not possible because society was not able to imagine itself as a group. According to him, print media made possible the notion of community, to include certain people and to exclude others that were not considered as part of the nation. Other authors consider that this capacity to create a sense of imagined belonging was not as new and exclusive to print media as Anderson suggested. Religious architecture and routines also made it possible for people to feel part of an exclusive group but on a smaller scale (García Canclini, 2001). What print capitalism exclusively enabled was the perception of belonging to a political group and helped the rise of the Nation-States succeed.

The shared cultures enabled by mass media are at the same time heterogeneous due to the individual identity considering aspects like gender, family position, occupation, race, religion, etc. (Schlesinger, 1991). Another way of emphasising these two identity levels is by the classification presented by Rodrigo and Estrada (2008). According to them, the 'intracultural level' positions individual points of view within society and the 'extracultural level' differentiates between a collective culture and others. Therefore, as mentioned previously, individuals possess a collective identity but also an individual one and both are defined by the relationship to the *other*.

Other authors argue that individuals possess not only two but several identities corresponding to different levels such as local, regional, transnational, global, etc. (Straubhaar, 2013). In a similar way, García Canclini (2014) assumes that in the current era identities are polyglot, multi-ethnic, migrant, etc. and are formed from elements of different cultures. Consequently, heterogeneity is not only encountered within communities but also within the same individual. If we consider the relationship between culture and identity, this is not as direct as it used to be since the increase in simultaneous cultural exchanges produces influences on individuals by different cultures, resulting in multiple identities.

1.2.1. Local identities as the reason to protect local television markets

Within the context of Nation-States, the ideas of 'national identity' and 'national culture' have often been used as reasons to criticise the large amount of imported content in local media systems, not only in the Third World but also in Europe, and to denounce the imbalances of international media flows (Mattelart, 2006). The European Union (EU) has created legislation (the Television Without Frontiers (TWF) and the Audiovisual Media Service (AVMS) Directives) to protect, amongst other aspects such as the economic strength of the European audiovisual sector, as we will see in the regulation chapter, the cultural identities of Europe.

The European Broadcasting Union (EBU), the association of European public national broadcasters, has also been concerned about Europe's cultural identity and in 1993 declared that too much imported media would damage the cultural identity of the new Eastern European democracies (Luce, 1993). Another example is French politicians who are also strong advocates of their national identity and were firm on arguing the specifics of media products and cultural industries in the General Agreement on Tariffs and Trade (GATT) negotiations (Mattelart, 2006; Morris, 2002; Robertson, 1995).

After referencing all these organisations, we can say that national identities and national cultures are an area of concern when discussing media flows. However, both expressions are linked to the problematic idea of nation. With the proliferation of Nation-States, the terms nation and state were often considered indivisible and there are still some discussions about the appropriate use of them. As an example, according to Anderson (1983) the media does not simply create an imagined community, but also a political community equal to the Nation-State.

Theories analysing global media flows have often followed this point of view talking about identity and culture as territorially-based to a political area as a Nation-State (Esser, 2016). This simplification supposes a homogenisation and simplification of media flows since not all states have a unique collective identity. With no intention of delving into the complex definition of nation and its political repercussions, in a general sense we can argue that not all states have unified cultures allowing the coexistence of different identities.

This research focuses on two territories, the United Kingdom (UK) and Spain, which form with a distinct political unit. However, there are regions with clearly differentiated cultures within their territory. In the case of the UK, it is formed of four different nations. In Spain, the country is divided into seventeen autonomous communities and two autonomous cities. Some of these communities, namely the three historical regions (Catalonia, Basque Country and Galicia), have actively expressed the sense of belonging to a collective identity different from the rest of the state. Accordingly, these multicultural countries create differentiated identities.

Nevertheless, the television markets of both sample countries coincide with the state borders, while coexisting alongside a number of regional channels. This creates a limited and differentiated group compared to other audiences because of their shared television context, always assuming that they are not a homogenous mass since individuals possess multiple identities (García Canclini, 2001; Mattelart, 2006; Rodrigo & Estrada, 2008; Straubhaar, 2007, 2013).

This acknowledgment broaches a problem when using the concepts of 'national cultures' and 'national identities' when talking about television markets because it entails using the concepts of 'national audiences' hiding the heterogeneity of Spain and the UK. In order not to overshadow the differences within the states, this dissertation refers to the television markets and their products as *local markets* and *local programmes*, meaning that it belongs to that territory. This will help to clearly differentiate from imported programmes produced outside the borders of the political state.

The use of the term local in this study is not to be confused with the concept of local television channels, referring to those regional channels of a city or a group of cities as used in Prado (1985, 2004) or Prado and Moragas (1991, 2002).

1.3. Global versus Local

The studies of the presence of imported television content have been concerned with the outcome of cultural exchanges and relationships between global and local cultures in both cultural studies and political economy paradigms while focusing on different aspects. Television programmes, as cultural goods, are part of and also impact and shape local cultures and identities. Furthermore, when these products cross borders, they have a new cultural presence in the new territory.

Contact between different cultures is not a new phenomenon developed in the latter decades of the 20th century. In fact, exchanges amongst cultures have been present for a long time with some affirming that the forces of globalisation started as early as the colonization of America (Sinclair, 2000). Notwithstanding, the difference at the end of the last century was the rhythm and strength these exchanges were made at due to technological advances and causing flows between places and people to become faster than ever.

The sheer pace of connectivity led to the appearance of the buzzword of recent decades: globalisation. According to Robertson this concept refers to "a particular series of development concerning the concrete structuration of the world as a whole" (1990, p. 20). Giddens defines it as "that stretching process, in so far as the modes of connection between different social contexts or regions become networked across the earth's surface as a whole" (1990, p. 64).

Despite several interpretations and connotations of the concept, this basic idea is that the world as a whole is highly interconnected. Expressions like 'Global Village' of McLuhan (1987), an innovator in considering the world as global, or ideas heard in the United Nations (UN) as 'Our Global Neighbourhood' conceptualize the general idea behind globalisation. The change between the modern era and the era of globalisation (despite discussions about this being part of postmodernity or the culmination of modernity) is the penetration that global exchanges now have. While in the print capitalism era described by Anderson (1983) the effect of print media and migration were limited, technological advances have allowed these exchanges to have a faster and broader impact (Tomlinson, 1999).

The increase in connections does not only have implications on cultural aspects. Globalisation has multiple dimensions such as economic, political, social, personal, cultural, technological, etc. (Tomlinson, 1999), which are studied intensively throughout the different disciplines of the social sciences. In a similar way, Robertson (1990) considers that there are different aspects of globalisation highlighting the features of local societies, the system of international relations and the concepts of individuals and humankind.

Appadurai (1996) also contemplates the multidimensionality of globalisation. Global flows occur under the globalized connections of five different landscapes: *ethnoscape*, the flux of people; *technoscape*, global technology with no borders; *financescapes*, global capital; and two landscapes of images: *mediascapes* and *ideoscapes*. For *mediascapes,* Appadurai considers the distribution of all mass media and the images that are provided to a global audience. Similarly, inside *ideoscapes* are all the political images with ideas related to "freedom, welfare, rights, sovereignty, representation, and the master term democracy" (Appadurai, 1996, p. 36).

Considering the multidimensionality of globalisation and that it impacts all aspects of human life, we will turn our attention to the dimension specifically regarding mass media (*mediascape*) and in a broader sense, culture. However, this does not undermine the point that media and culture are directly related to other dimensions of globalisation such as economics, technological and social, if not all since the global world is possible because of a 'complex connectivity' between all dimensions (Tomlinson, 1999).

The effects of these global flows on local cultures are one of the most feared aspects of globalisation. In general terms, these effects have been explained by two broad tendencies defending homogenisation or heterogeneity. In the next section the different considerations under the homogenisation thesis will be presented followed by the paradigms defending heterogeneity will be explained.

1.3.1. The fears of homogenisation

According to the homogenisation thesis or the 'mythology about globalisation' (Ferguson, 1992), an extreme perception and understanding of the globalisation concept, global unification is inevitable. "Statements about the negative effects of imported media on identities are based on the assumption that something from outside – media – will corrupt something inside – identity" (Morris, 2002, p. 280).

Globalisation always assumes a certain degree of the world as a unique unit. However, homogenisation theory is currently mostly rejected because clear signs of heterogeneity (cultural, political, social, etc.) are still remarkably visible. Notwithstanding, during the decades of the 1960s and 1970s the paradigm of media imperialism, perhaps the first theory concerning globalisation with no use of the term (Friedman, 1994; Tomlinson, 1997, 1999), denounced a clear fear of the domination by Western cultures through media flows, mainly the US, of more vulnerable cultures. Ultimately, according to this paradigm this would end with homogenisation (Schiller, 1969).

1.3.1.1. Media imperialism

Schiller, the forefather of *cultural imperialism*, wrote in 1969 about the high levels of American content in South America and other Third World Countries. Cultural imperialism, which other authors focused on media referred to as media imperialism (Boyd-Barret, 1977; Sepstrup, 1990; Tomlinson, 1991; Tunstall, 1977; Varis, 1984), was concerned with the ways the US was using mass media to impose its economic and social structures onto other more vulnerable countries to ensure American domination worldwide. "Mass communications are now a pillar of the emergent imperial society. Messages 'made in America' radiate across the globe and serve as the ganglia of national power and expansionism" (Schiller, 1969, pp. 147–8). These affirmations generated intense debate creating followers and opponents in equal measures.

Nevertheless, it has to be acknowledged that this paradigm appeared during the Cold War when the relationships between countries were significantly different than now or the situation in the late 1980s or 1990s. In those earlier decades, this theory was supported widely by researchers from the Third World and progressives from Western countries.

Within Latin America, the *dependency theory*, correlated with the imperialism ideas, was firstly used to explain the economic situation of the countries and was later translated to what was happening in their broadcasting systems. The dependency theory turned its attention to the internal markets and recognized that the situation of each country had to be considered within the analysis (Salinas & Paldan, 1979). This contrasted with media imperialism, which was focused on the governments and companies of the Western World, mainly the US. Notwithstanding, both were critical of the dominance of US content and companies in local markets and denounced the forces of homogenisation.

During the decades of the 1970s and 1980s, when these paradigms were widely supported by scholars and politicians, media flows were at the centre of international institutional debates, especially in the United Nations Educational, Scientific and Cultural Organization (UNESCO, founded in 1946). In its initials years, UNESCO was a firm supporter of the idea of the 'free flow of information' and the 'modernization' paradigm. This was introduced before the end of the Second War by the US who were anticipating their most probable win (Raube-Wilson, 1986).

UNESCO defended the 'free flow of information', which even though it was not a communication policy acted like one, appealing to the human rights of individual freedom and freedom of expression (Schiller, 1969). According to Schiller, this institutional support is how the US imposed its domination on to Third World countries:

> If free trade is the mechanism by which a powerful economy penetrates and dominates a weaker one, the 'free flow of information', the designated objective incidentally of UNESCO, is the channel through which life styles and value systems can be imposed on poor and vulnerable societies (1969, pp. 8–9).

Some Third World and non-aligned countries started arguing in 1978 on the UNESCO platform for the necessity of creating a New World Information and Communication Order (NWICO) to correct the imbalances of media flows (Carlsson, 2003; Mattelart, 2006). Soon after, NWICO became the official position of UNESCO and this generated disagreements with a number of Western Countries, especially the US, which withdrew from the institution in 1984 followed by the UK (Raube-Wilson, 1986). However, not all Western countries were against it and France was one of the firm proponents of the necessity of a new order. Despite the change of position in the UNESCO, the discussion of the NWICO died at the same time as media imperialism loosened its hegemony regarding the analysis of media flows.

At the end of the 1970s some authors started to question the theory of media imperialism as Schiller had proposed it and argued that even though they still agreed that there was American imperialism in the media of many countries, this process was not as simple as the scholar had presented it. In 1977 Tunstall wrote *The Media are American: Anglo-American Media in the World* where he considered that Schiller enlarged upon the presence of the US in the television industries of Latin America. He agreed that there was media imperialism but argued that in the 1960s the television industry was still new and had not developed, therefore there were not a lot of local productions. The presence of this type of content during the 1970s had reduced considerably. Moreover, he perceived that the expression 'one-way flow', frequently used by the first authors of the media imperialism, was an over-simplification.

According to Tunstall, Schiller did not pay attention to the regional exporters that worked in some parts of the world. Nevertheless, it still had to be considered that these exporters were themselves huge importers of American products.

> This phenomenon can be seen as a running counter to the media imperialist thesis – showing that American and British media exports have many substantial rivals. But there are also grounds for seeing Mexican or Egyptian or even Indian exports as an indirect extension of Anglo-American influence (Tunstall, 1977, p. 62).

Tunstall also considered the situation of the television market as an evolution of the previous situation in the press and radio. "Schiller attributes too many of this world's ills to television" (Tunstall, 1977, p. 63).

Another major criticism of media imperialism was that this theory assumed that US cultural messages were transferred to local societies with no mediation by the audiences (Dorfman & Mattelart, 1975). It did not consider how local audiences interpret and assimilate media messages and ignored "the hermeneutic process of appropriation which is an essential part of the circulation of symbolic forms (including media products)" (Thompson, 1995, p. 171). As many studies have concluded, cultural content is interpreted differently depending on different parts of the world (see Ferguson, 1992; Liebes & Katz, 1990; Morris, 2002; Robertson, 1990; Tomlinson, 1991; Varan, 1998; among others).

This argument highlighted the lack of empirical evidence of media imperialism and some argued that "labelling something imperialistic is not the same as proving it is" (Liebes & Katz, 1990, p. 4). However, media imperialism was not only related to the amount of American programmes broadcast even though many times it has been simplified in that way. “The concept of cultural imperialism is dependent on qualitative and quantitative judgments. The conditions of quantitative subordination are economic and organizational, the conditions of qualitative subordination are cultural and aesthetic” (Collins, 1986, p. 70).

In 1974 UNESCO published the first empirical study on international exchanges in the television market. Nordenstreng and Varis (1974) wrote, with the help of professionals from the countries analysed, the report *Television Traffic, a One Way Street? A Survey and Analysis of the International Flow of Television Programmes Material*. They confirmed the general assumption of media imperialism, where one country, the US, dominated the flow of television content. Notwithstanding, there were countries in all regions around the world with high levels of local production and others with a high dependency on the international market.

The results from the countries analysed in Western Europe[1] show that there were large differences between territories. While the UK, France or Italy imported only between 10 and 15 per cent of their content, in smaller countries, such as Iceland or Ireland, imports represented more than the half of their programmes. Despite the confirmation of the ‘one-way street’ flow criticised by media imperialism, this study was made when most countries were at the initial states of their broadcasting system. Soon it was clear that media travelled in a ‘patchwork quilt’ with different flows and directions (Tracey, 1988) even though the biggest flow was still from the US to the rest of the world.

Despite the many critics, media imperialism was conceived to denounce the inequalities of the broadcasting systems that were still being established in most parts of the world. However, the relationships between the different countries changed after the end of the Cold War so that the word imperialism seemed less appropriate in the new situation. Furthermore, media imperialism put the Nation-States at the centre of its arguments when in the 1990s they were no longer the only players, and possibly were not even the dominant player. Schiller himself stated in 1991 that perhaps there was no longer American cultural imperialism but a cultural imperialism of big multinational corporations with a strong American accent. However, most scholars considered that homogenisation as a consequence of media imperialism was not becoming a reality.

[1] The Western European countries included in the Nordenstreng and Varis (1974) report were: Federal Republic of Germany, Finland, France, Iceland, Ireland, Italy, the Netherlands, Norway, Portugal, Sweden, Switzerland (Deutschw.) and the UK.

[2] Viewing during the next seven days after their linear broadcast.

Globalisation became the new buzzword when discussing media flows in particular and international flows in general. In the new context, media imperialism was criticised because of its natural inclination to be aggressive. However, this was a controversial theory because it needed to point out how media flows were influenced and highly conditioned, implicitly, by power. Globalisation, in contrast, does not support the idea that there is an explicit intention to impart control from one territory to others.

1.3.1.2. Media imperialism in Europe

During the 1980s media imperialism became not only a concern to the Third World, but also a concern for European countries (Herman & McChesney, 1997; Schiller, 1991). The discussion of the presence of media imperialism in Europe, also under the name of *Dallasification* (De Bens & de Smaele, 2001), was instigated by the overwhelming success of the Serials *Dallas* (CBS, US, 1978-1991) and *Dynasty* (ABC, US, 1981-1989) in most Member States of the European Community. This provoked the spread of empirical studies on television flows (Blumler & Hoffman-Riem, 1992; Collins, 1986; DeBens, Kelly, & Bakke, 1992; Pragnell, 1985; Sepstrup, 1990; Silj & Alvarado, 1988).

Notwithstanding, these concerns should be contextualised. Most European television markets broke their public monopolies during the 1980s and commercial channels were launched. The growth of channels required a considerable number of hours to be filled with content but the limited financial resources and the underdeveloped independent production markets of the European countries forced the new players to look for content on the other side of the Atlantic. Consequently, during this decade the influence of the US on European television greatly increased over the public monopoly era (Esser, 2009a). Prado (1997) argues that since there was a low level of circulation of European products, the shared characteristics of the fiction scheduled in Europe were US programmes.

In the mid-1990s the situation began to change as the new commercial channels created in the previous decade became established and their financial strength increased. Therefore, the overwhelming prominence of US content coincided with no more than the initial phase of most commercial broadcasters. Soon, when the channels were more economically viable, local fiction started to be produced, the genre which was most acquired, and the presence of US content decreased despite retaining a significant presence (Buonanno, 2002; Moragas & Prado, 2000).

1.3.1.3. Americanisation

The fears of US domination and homogenisation of cultures did not end in the globalisation era in spite of the change of word due to the consideration that imperialism was not appropriate in the new world relationships. In the late 1990s some authors were still concerned about the strength of certain territories. They considered that it was more appropriate to talk about Westernization or Americanisation rather than globalisation because the ideas globally spread were from Western countries, especially the US (Appadurai, 1996; Tomlinson, 1999). Nederveen Pieterse suggested that globalisation "is a theory of Westernization by another name" (1995, p. 47). Mattelart (2006) explained that the word 'Americanisation' was firstly used internally to talk about the adaptation process of the new immigrants to American culture. However, he remarks that in 1898 the US president Theodore Roosevelt had already pledged for the Americanisation of the eorld.

Nevertheless, Appadurai considers that Americanisation is just one of the homogenisation forces of the world. What most authors do not consider, according to this author, is that "for the people of lrian Jaya, lndonesianization may be more worrisome than Americanization, as Japanization may be for Koreans, lndianization for Sri Lankans, Vietnamization for the Cambodians, and Russianization for the people of Soviet Armenia and the Baltic republics" (Appadurai, 1996, p. 32).

Other concepts based on more capitalist aspects have translated the fears of homogenisation into the globalisation context. Herman and McChesney (1997) tried to update the media imperialism paradigm in their book *The Global Media*. Another example is presented by Ritzer (1993) with the terminology 'McDonaldization of the World' which implies a homogenisation of Western characteristics, including cultural aspects. This idea was further developed for television by Waisbord (2004) explaining the characteristics of 'McTV'. This vision is linked to Dan Schiller's (1999) 'digital capitalism' who thinks that the forces of capitalism, especially transnational conglomerates, are generalizing cultural and social aspects around the world.

1.3.2. Global diversity

The paradigms of media imperialism, dependency theory and understanding globalisation as Americanisation, McDonaldization or digital capitalism are all under the same umbrella of the homogenisation thesis. However, empirical signs show that no complete global standardisation has occurred around the world since there are clear compensatory trends that pull towards cultural and social division (Tomlinson, 1999).

The cross-border links between media systems have greatly increased by digitalisation and the Internet but the role of states is still highly significant despite not being the only players anymore. Moreover, television is still mainly a medium based on the borders of political states. Only the states have the supremacy to control the license of the broadcasters and create a legal framework.

Due to these expressions of heterogeneity, other theories have appeared to explain the relationship between global and local cultures in the globalisation era. Tomlinson (1999) talks about a functional proximity that creates a globalized space but not a global culture. Mattelart (2006) argues that there is a circularity with the notions of global and local and the actions taken in one space have repercussions on the other, but they do not eradicate one another. This idea emphasize the well-known mantra 'think globally, act locally'.

In this globalized space three main concepts can be analysed that understand the relationships between global and local in a heterogeneous context: *indigenisation*, *hybridisation* and *glocalisation*. Despite the concrete differences between these three theories, the main focus in all of them is that locality does not disappear after contact with globality, it is only reformulated.

1.3.2.1. Indigenisation

In the globalisation context, the concept of *indigenisation* has been used broadly to describe the outcome of cultural exchanges. According to Appadurai, the homogenisation thesis has to be rejected because "as rapidly as forces from various metropolis are brought into new societies they tend to become indigenized in one or another way" (1990, p. 5). Therefore, aspects of other cultures that enter a local context are altered to fit their new environment. With this perception of the relationship between global and local, Appadurai (1990) distinguishes between the globalisation of culture and homogenisation, denying the latter one. Global connections involve the generalization of certain aspects of culture such as advertising techniques, language hegemonies and clothing styles. However, these aspects are only instruments where culture is carried and can still create heterogeneous imagined worlds.

Taking the initial concept presented by Appadurai, Buonanno describes indigenisation as "the process through which forms and expressions of external cultures, elaborated by other societies, are appropriated, re-elaborated, and restored by diverse local societies in configurations that are consistent with their own home-grown systems of meaning" (2008,

p. 88). Therefore, the mixture of foreign and local aspects creates new elements linked to the local territory.

1.3.2.2. Glocalisation

The term *glocalisation* was firstly used in Japan to describe the marketing technique that companies were using to adapt global products to specific local markets (Mattelart, 2006; Morris, 2002). In social studies this concept has been adopted to explain the mutual dependency and interconnection between the global and the local. Robertson (1995) used glocalisation, instead of talking about globalisation, to counteract the major weakness of the later concept: the undervaluing of locality. The global context is not a homogenisation force but a referential frame inside which different ways and perceptions of life occur. Furthermore, with local context at a similar level as the global, the directions of influences are two sided. Not only does the global influence the local but also the reverse.

This concept is naturally translated to the current television context. Global television companies, producers of 'global culture', are adapting their products to local audiences (CNN, MTV, Discovery, etc.) (Mattelart, 2006; Robertson, 1995). At the same time, global content (US content) is being produced with the idea in mind that those products will be internationally consumed and will be introduced to foreign television schedules.

Another television trend that reveals the logic of glocalisation is format trades, the adaptation of a global formula to the characteristics of a local market, which grew especially in the late 1990s and the beginning of the 21st century (Moran, 2009b; Chalaby, 2015). The popularization of adaptations has not caused a loss of diversity and has not encouraged the perception of a homogenized culture (Moran, 1998). One illustrative example is the success of local adaptations of the Colombian *telenovela Betty, la fea* [*Ugly Betty*] (RCN Televisión, 1999-2001) around the world (Adriaens & Biltereyst, 2012; Mikos & Perrotta, 2011; Murillo & Escala, 2013; Zhang & Fung, 2014).

However, it should be mentioned that formats are not localised to preserve and acclaim multiculturality, but to be more appealing to audiences and increase profitability. "For global television companies, cultural difference is not an obstacle, but, if incorporated properly, it could be a boon" (Waisbord, 2004, p. 378). In addition, differences between local adaptations "can be predicted by the ownership, funding and size of the channel" (Jensen, 2012, p. 37) rather than local cultures.

1.3.2.3. Hybridisation

Hybridisation is the third concept broadly used when discussing the inclusive relationships between the global and the local and it can be defined as "the interpretation of the global and the local, resulting in unique outcomes in different geographical areas" (Ritzer, 2004, p. 163). This word, with an initial use in biology and botany, has been used from the 1990s onwards to unify different processes analysed by the social sciences under the same umbrella (fusion of different music styles, miscegenation of races, religion syncretism, merging of two languages, creolisaiton, postcolonialisation cultures, etc.) (García Canclini, 2001; Hannerz, 1997). However, the processes of hybridisation have always been present in the mediations between local cultures.

The outcomes of the relationships between the global and the local has to be considered as a constant process of mediation, not as a stable result of the mixtures. Consequently, cultural identities are never pure, they are always the result of a history of mixtures. Traditional cultures as well as local identities are not disappearing as the homogenisation thesis suggested, they are constantly being reformulated (García Canclini, 2001; Hall, 1996; Hannerz, 1996). Significantly, not only vulnerable cultures suffer hybridisation, these processes have multiple directions and all cultures around the world are being reformulated by contact with other cultures, whether outside their borders or within. Furthermore, the role of localisation is not to counteract globalisation but they are two poles that have to find a balance.

The abundant use of the word hybridisation (and also its synonyms indigenisation and glocalisation) has been criticised for being too descriptive and not critical enough of the global situation. "All cultures are always hybrid… Hybridity is meaningless as a description of 'culture,' because this 'museumizes' culture as a 'thing'" (Werbner, 1997, p. 15). Nevertheless, accepting the paradigm of hybridisation should not assume or overlook the inequalities of these processes. Instead, cultural hybridity is constructed under hegemonic economic and political powers. The global and the local often are at different levels of power and hybridisation processes subordinate, exclude and segregate some parts of the world, social classes and cultures (Appadurai, 1996; García Canclini, 2001; Hannerz, 1997). These theories can (and should) support a critical point of view, not only descriptive, with the aim of denunciation as in the media imperialism paradigm.

Despite the similarities between the indigenisation, glocalisation and hybridisation paradigms, the main distinction is that while in the perception of hybridisation the global and the local always mix to create something new, indigenisation and glocalisation perceive the global and the local in the same time - they do not mix or supplement each other. In addition, we find that while indigenisation and hybridisation are more popular in social science in a broader sense, the term glocalisation is used frequently when examining television flows due to the characteristics described previously.

1.3.3. Deterritorialisation

In the globalisation context, the increase in speed and volume of cultural flows advanced the theory of the *deterritorialisation* of culture (Appadurai, 1990, 1996; García Canclini, 2001) questioning the 'natural' relationship between culture and a geographic territory. Therefore, if we talk about deterritorialisation, we assume that the relationship between culture and territory expressed in the classic definitions of culture was true until the onset of globalisation (García Canclini, 1995).

Deterritorialisation implies that cultural aspects and flows do not have a link to a specific territory or region. While Appadurai (1990) defends the Deterritorialisation of all global flows, most aspects create new links to a new territory meaning a *reterritorialisation* of some cultural flows (Straubhaar, 2008; Tomlinson, 1999). Consequently, the links between culture and location usually do not erode completely. There are cultural aspects with no specific links to a territory that move at a global level but, at the same time, most cultures are still strongly linked to a certain region and cannot be undermined.

This idea of reterritorialisation is parallel to the Giddens (2000) concept of globalisation as a two way process which explains the recent exaltation of localism. It is broadly accepted that locality is transformed by globality but at the same time globality is influenced and shaped by a geography creating flows in both directions. The global context requires that cultures demonstrate the differences between *them* and *us,* which Giddens exemplifies with the new resurgent nationalisms.

This is also reflected in the growing necessity of localisation in media. As previously stated, the trend of format trade is one clear example that global products work better if they are localised (Chalaby, 2016a; Moran, 2007). Nevertheless, we cannot confuse localisation with the necessity of preserving traditional cultures intact. Local cultures are not something immobile that has to be preserved forever and unchanging, instead, they are constantly evolving. However, at the same time it is important to be aware of the imbalances in the relationships between the global and the local.

1.3.4. Transnationalisation

Globalisation was the buzzword from the end of the 1980s to the beginning of the first decade of the 21st century. However, the imbalances in globalisation and the persistence of samples of locality in every territory created a shift of mentality and an acceptance that the concept of a global era was not accurate. García Canclini said in 2007 that we were already in a time of *deglobalisation* exemplifying this with the return of bilateral rather than international political agreements. Similarly, Hannerz is uncomfortable using the word globalisation because "many such processes and relationships obviously do not at all extend across the world" (1996, p. 6). Instead, he feels that the concept of *transnationalism* is more appropriate.

This concept includes the problematic term 'nation'. However, in this case, since the flows have different levels such as local, regional, national (not necessarily from a Nation-State), state, supranational, etc., the use of this term does not indicate that we are referring to the Nation-States as the main and only player of transnational flows. Furthermore, it helps undermine the duality between global and local. Global media flows, as seen previously, are not always, if ever, global. They only affect several states or regions at once (Hopper, 2007) and "broadcasting processes, as those in many other sectors, have not proceeded in uniform or evenly distributed patterns" (Esser, 2007, p. 166). This view does not provoke fears of homogenisation like Americanisation or Westernization. In a transnational context there is no division between centre and peripheries, there are multiple flows and in multiple directions at local, regional, national and transnational levels (Inda & Rosaldo, 2008; O'Regan, 2000; Scott & Lury, 2007).

We consider that the use of the term Transnationalisation is more appropriate when talking about flows because television exchanges include different territories but not all of the television markets of the world or not at the same time. Additionally, it does not hide the imbalances of flows as globalisation or internationalization, often used as synonyms, do. At the same time, transnational flows are not entirely deterritorialised as some globalisation theorists have argued (Appadurai, 1990, 1996; García Canclini, 2001). These flows have directions and emanate from a particular territory before moving to other specific markets.

While often there is an opposition between the concepts of global and local, "Transnationalisation and localisation should not be viewed as binary opposites but as two sides of one at the same coin" (Esser, 2007, p. 181). Localisation is part of the process of Transnationalisation since the similarities across local television markets creates the need to distinguish from one another, without erasing the growing similarities.

Within the transnationalism frame, Sinclair et al. (1996) discuss the existence of 'geolinguistic regions', with cultural, linguistic and geographical connections, where constant media flows are exchanged between those territories. These regions usually have connections due to their colonial past as in, for example, the Latin American countries. This promotion of regional flows has also been known as the 'peripheral thesis', which analyses the flows in regions once considered periphery like Latin America or Asia and remarks that not all flows pass through the centre (Keane, 2006; Sinclair, 2000; Sinclair et al., 1996). This endorsement has even prompted discussion of a contra-flow argument, focusing on the flows from the periphery to the centre (Bilteryst & Meers, 2000; Jensen, 2016). However, we consider that despite not being a one-way flow and not affecting the world globally, the imbalances are significant and certain flows have a hegemonic position.

Despite Transnationalisation rejecting homogenisation, local markets are affected by transnational contexts and flows. Esser (2007) talks about *approximation*, not only with canned and format contents but also with shared production patterns and values, scheduling practices or programme financing. Other authors consider that media, when trespassing cultural borders, is *recontextualised* (Inda & Rosaldo, 2008; Peterson, 2003; Straubhaar, 2007). These points of view also explain the phenomenon of format trades because the adaptations are recontextualised to embrace the characteristics of their new locality (Esser, 2007; Smith & Steemers, 2007).

1.4. Europeanisation

After analysing how television flows have been studied from an international point of view and identified the buzzwords used to talk about them, it is necessary to add another concept relevant to the countries analysed in this dissertation, Spain and the UK: Europeanisation. "'Europeanisation'—like 'globalisation'—can be a useful entry-point for greater understanding of important changes occurring in our politics and society" (Featherstone, 2003, p. 3). However, this concept, if not well defined, does not have any analytical power.

Featherstone (2003) analysed how this term had been used over the last two decades by social science researchers and concluded that there was not a clear definition of the term and usually no intention to explain it. According to his research, the term has been used with four different aims. The first is to talk about a 'historical phenomenon' and refers to the exportation of cultural and social European values. The second is called 'Transnational Cultural Diffusion' and focuses on the exchanges of values across and within Europe. This concept is usually very broad and has been used to talk about all cultural and social aspects. The third use of Europeanisation is the 'adaptation of policies and policy processes' and refers to the transposition of European law to the different Member States and the consequences to their legal framework. Lastly, the fourth use of the term is to talk about the 'institutional adaptation' of the countries to adjust to European practices.

We will use the Europeanisation definition of transnational cultural diffusion to explain the television flows across the European countries. For us, Europeanisation refers to the television flows that start in a European market and progress to other European countries. Europeanisation understood in this sense has been sought by European institutions since the creation of the first directive affecting broadcasting (TWF Directive). As will be studied in Chapter Four concerning regulation, one of the aims of this act, reaffirmed in the AVMS Directive, was to seek Europeanisation through a single television market, which would help to shape a common European identity and culture.

It has to be highlighted that the concept of Europeanisation is not theoretically far from the term globalisation in the sense that there is only a different scope of territories. Furthermore, Nerderveen Pieterse (2008) considers that the first is part of the second. Thus, while in the concept of globalisation we highlighted the imbalances of flows, at a European level we should not forget this asyncronism. "The impact of Europeanisation is typically incremental, irregular, and uneven over time and between locations, national and subnational" (Featherstone, 2003, p. 4). Furthermore, Collins (2014) questions why Europeanisation is not feared as much as globalisation.

Despite the institutional efforts, "Europeanness would be especially problematic because it has to emerge from an extensive history of highly conflictual collective identities" (Schlesinger, 1993, p. 7). The cultural diversity acclaimed by the European Union is the same that hinders the creation of a common European identity. According to Ruvalcaba "the very concept of a 'common European identity' lacks realism, it is unrealizable and would probably end up being a reflection of big countries' culture to the detriment of small countries' culture" (Ruvalcaba, 2007, p. 4). Moreover, the recent signs of Euroscepticism in certain Member States, culminating in the Brexit referendum result to leave the EU, exemplifies the doubtful success in the creation of a shared sense of belonging.

With the difficulty and problems of establishing a European identity, there are some shared minimums that help create unity within the diversity of the political union. European countries live under "democratic forms that permit and guarantee the coexistence of different faiths, cultures and ethnicities in conditions of mutual respect" (Schlesinger, 1993, p. 11). European flows should be encouraged so citizens can have a broader sense of the other cultures of EU members without implying the creation of a unified European identity. The contact between cultures helps local societies to evolve and be more tolerant and open.

1.5. Partial conclusions: Local television markets as part of a transnational context

It is unquestionable that cultural flows are faster and stronger than a few years ago and "few important films, news broadcasts, or television spectacles are entirely unaffected by other media events that come from further afield" (Appadurai, 1996, p. 4). Furthermore, technological advances have greatly increased the number and speed of connections than when most discussions on globalisation took place. Nowadays it is possible to access media content from almost every part of the world simply by using a phone or a tablet. However, television is still tightly defined by state borders despite knowing that we have to increasingly consider the transnational television context as a contextual frame for local content and industries. Thus, in terms of television, with a clear distinction with the capital dimension, we find transnational contexts rather than transnational markets with the European level also influencing the local markets of Spain and the UK.

In the current situation where culture is constantly moving, the inequalities of cultural flows can be easily overlooked. We have to recover the critical view of paradigms like media imperialism or the dependency theory to point out that even though the control and the domain is now in transnational companies more than in the states or regions, all flows are not at the same level and not all directions have the same strength. Despite there being multiple flows with different directions between regions, both economically and culturally, as Sinclair (2000) mentioned, regional exchanges do not have the power to invert the dominant patterns.

Nonetheless, the fears of homogenisation that periodically arise are not based on empirical facts. Locality is still very important in television schedules and has been reinforced with the popularity of format adaptations (Chalaby, 2012, 2016a; Moran, 2007). The diversity of television markets and schedules and the new acclaim for locally produced programmes allows us to argue that there are still heterogeneous local cultures and identities when referring to television audiences despite aspects such as scheduling techniques and production values are *approximating* (Esser, 2009a).

However, it is questionable in this complex situation of media flows, whether television is the most influential player for creating identities (García Canclini, 2014). The Internet, the media with fewest borders and most deterritorialised, helps create transnational cultures across territories and dilutes the classic definitions of nation, identity and culture even more. But as Straubhaar (2008) and Tomlisnon (1999) have considered, these transnational and multiple identities do not erode the part of the identity that is linked to a territory. Local television still helps to create an imagined identity limited to a territory but this does not exclude some transnational trends that group certain audiences across borders.

2. THE ACQUISITION PROCESS

Most analysis focusing on the transnational television flows have overlooked the middle-range stages. However, the industry practices of local broadcasters greatly influence on the imported programmes local viewers will be more exposed to. In this chapter the acquisition process, which refers to the steps local broadcasters follow to buy television programmes from a foreign television market, will be contextualised in the transnational television value chain. In addition, the role played by the executives in charge of this procedure will be discussed.

2.1. The television content value chain

Television, as with any other economic market, can be structured and allocated into production steps with the aim of creating a final product (Hopkins & Wallerstein, 1986). In general, transnational value chains possess four different dimensions. First, they are composed of a sequence of steps which add value to the economic activity. Thus, they have an input-output structure. Second, they have a territorial dimension, which refers to the spatial dispersion of the process. Third, they have governance structure, which denotes the relationship of power among the agents of the value chain. Fourth, local elements that refer to how individual markets influence the transnational value chain. Specifically, the relevant elements are upgrading (i.e. the dynamic movements between the different steps of the chain), institutional context and industry stakeholders (Gereffi & Fernandez-Stark, 2016).

In the transnational framework, several value chains have been presented analysing and presenting the audiovisual sector in the digital era (Allee, 2009; Barata, 2010; Bustamante, 1999; Evens, 2015; Goldberg, Prosser, & Verhulst, 1998; Griffiths, 2003; Wirtz, 2001). A principle distribution of a general television value chain is reflected in the illustration presented by Griffiths (2003), which is divided into five different steps (Figure 1).

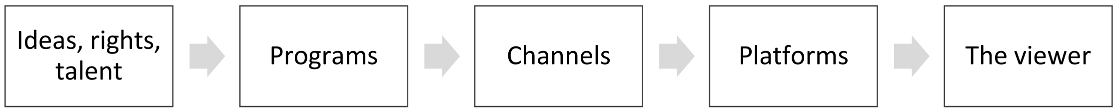


Figure 1 - The parts of the basic television supply chain.
Source: Griffiths (2003).

A similar structure was presented by the Office of Communications (Ofcom) in 2007 but blended the sector of 'ideas, rights and talents' with 'programmes' forming the sector known as 'content products'. Thus, they organised the value chain into four main sectors: 'content producers', 'wholesale channel providers', 'platform service provider' and the final 'user'. This simple structure is certain but it does not focus on the middle segment of the television transnational value chain, the distribution, since it is more focused on exemplifying the process within a local market.

In a detailed description, Chalaby (2016b) introduced a television content value chain in to reflect the new situation of the television market that has become more transnational at all stages. These transformations have affected from the equipment manufacturing companies to the local format adaptation of programmes.

> The disassembling of the old production model occurred when a combination of factors, including economic growth, rising industrial complexity, deregulation measures, trade liberalization and new technology, consumer demand and preferences, progressively led media firms to concentrate on those activities in which they retained a competitive advantage (Chalaby, 2016b, p. 38).

The author remarks that there have always been three main segments: Production, Distribution and Aggregation, but these have become global since the early 90s, coinciding with the initial rise of television formats and the growth of cross-border channels.

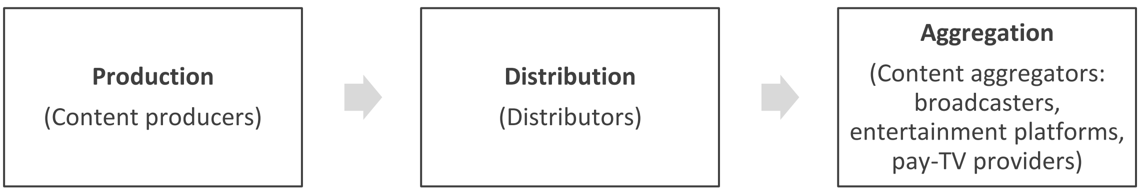


Figure 2 - Main segments of the television content global value chain
Source: Adapted from Chalaby (2016b).

The television content value chain presented by Chalaby (2016b) is adapted to explain the increase in transnational media flows. The positioning of 'distribution' as an equal element to 'production' and 'aggregation' allows us to study the middle-range process of acquisitioning, a step situated between the distribution and the aggregation segments. However, to allocate the process of scheduling, which is the other process studied in this dissertation, we will acknowledge the segment of the user/viewer presented by Griffiths (2003) and Ofcom (2007). It is an indispensable agent to consider when analysing the schedules since content aggregators adapt their schedules to their viewers.

Thus, the core of the value chain considered by this study is presented in Figure 3, highlighting the two middle-range processes which this dissertation focuses on: the acquisition and the scheduling processes. In the next sections considerations of the four segments of the value chain regarding acquired content will be presented.

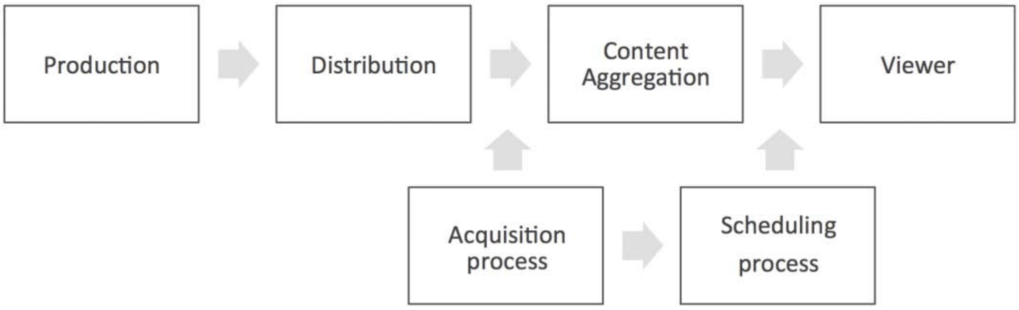


Figure 3 - Transnational television content value chain
Source: author.

2.1.1. The production segment

Production is the first element of the value chain and it is composed of not only the company which is financing the project but all the parts involved in the production of programmes (Miñarro, 2013). Furthermore, the production of audiovisual content can be created by different agents.

At the beginning of broadcasting in Europe, channels produced their own content. However, there has been a tendency to externalize most of the production. Thus, programmes scheduled can also be produced by an independent producer, also referred to external producer (Bustamante, 1999; Eastman & Ferguson, 2006). These producers can be part of the same local market, working by assignment or under their own initiative, or from a foreign territory. In addition, programmes can be made by a co-production between a local channel or producer and another party, either local or foreign.

When referring to local independent producers, a significant difference between the Spanish and British markets has to be stated. In most European countries when a broadcaster commissions a programme to an independent producer, it is the same channel which keeps all the rights for those contents (Chalaby, 2016a; Miñarro, 2013). However, in the UK the 2003 Communications Act enabled the local independent production system to keep the exploitation rights for the content produced initially for the channels, resulting in the empowerment of the independent sector and creating strong conglomerations referred to as super-indies (Chalaby, 2010).

While the production segment is not the centre of the study, it directly conditions the classification of the programmes regarding the type of production. To highlight the origin of the programmes scheduled in the general-interest channels, the types of productions will be divided into three categories: *local*, *imported* and *co-produced*. Firstly, those programmes that have been entirely produced in that local market will be referred to as local productions, with no concern about who is in charge of production whether the same channel or a local independent producer. Secondly, those programmes that have been produced entirely outside the local market by one or more foreign producers or channels will be called imported productions. Thirdly, in this dissertation co-produced productions will be referred to as those contents produced by the local market in collaboration with one or more foreign agents. Thus, in the Spanish market the co-produced category will hold those programmes produced between Spain and other countries while in the British market between the UK and another cross-border player.

2.1.2. The distribution segment

Distribution is situated in the middle of production and aggregation coordinating the relationships between these two segments. The main aim of distributors is to make the most profit from the content rights in different windows, platforms and off-screen markets (Chalaby, 2016b).

This role can be portrayed by the same producer or, instead, an external company can capitalize on the content rights in exchange of commissions and royalties. In addition, distributors do not always license the rights directly to a content aggregator. In some cases, they are transferred to a local or regional distributor that will be in charge of managing that intellectual property in only those territories.

The increase in television flows and the digitalisation of content has made the distribution segment even more prominent in recent years both for US majors and independent producers. "With the multiplication of genres, rights, windows, and platforms, distribution is an increasingly complex activity requiring support in finance, marketing, and commercial law" (Chalaby, 2016b, p. 42).

Nevertheless, there is a clear distinction between how US majors and other producers sell their rights to foreign markets. The strength of the US majors allows them to have their own distribution branch inside the same corporation. Additionally, they have headquarters in strategic markets where they control the international sales of several territories. For example, as Miñarro (2013) mentions, Universal has a headquarters in Madrid where it controls the territories of Spain, Portugal and Latin America while they also have offices in Miami to supervise the closest Spanish-speaking territories.

Moreover, due to the high levels of competition to acquire the products of the US majors in most foreign markets, they have exclusivity agreements with specific television channels to secure a higher and more stable income for their products in those foreign territories. With these agreements they often add library content, old titles already premiered, that channels have to buy in order to acquire new releases (Miñarro, 2013).

On the other hand, all the other production companies that are not US majors are called independent when discussing distribution (Miñarro, 2013; Turow, 2009). In this case, depending on the size of the company they will distribute the international rights themselves or, in the majority of cases, license their rights to an external distribution agency.

2.1.2.1. Exhibition windows of audiovisual programmes

As a consequence of the nature of audiovisual programmes, when a programme is sold by a distributor they do not sell the product *per se*. Instead, their rights for that programme are lent to aggregators. This allows distributors to create different windows for the rights in order to obtain the maximum income. The windows of a programme are "distinct markets separated by either geography or time, where buyers receive differential access and variable prices" (Havens, 2006, p. 13). Therefore, the windowing process establishes "the order in what the different audiovisual rights have to be exploited" (Miñarro, 2013, p. 107).

Separation by territory refers to the rights for a programme being sold to a channel that broadcasts in a specific and confined territory and cannot broadcast it in another region.

Usually products have their first run in their original market and are then aired internationally. However, this is changing and some programmes are being featured in different territories, including the original, at the same time. In addition, the availability of these rights is agreed for a limited period. This allows distributors to sell a programme to channels in the same local market in different timelines.

Since the marginal cost to produce an extra copy of a programme is very low, the windowing system allows distributors to take advantage of economies of scale and scope, significantly increasing their marginal returns. These incomes are all those originating from other sources than the first run in the local market. However, the economies of scale do not only have positive influences for distributors. The airing in one window diminishes the value of that product in a territory since the potential audience diminishes. In consequence, linear or online broadcasters are willing to pay gradually less for the content (Doyle, 2002). In addition, piracy is another area of concern that has increased since digitalisation has facilitated the easy creation of illegal copies to circulate online.

In order to minimize the decrease in appeal, distributors arrange the different windows to be able to earn the highest income. Before the diversification of windows, platforms and rights, the audiovisual industry and especially the US majors had a fixed windowing process for each genre. The traditional main windows are: movie theatres, home entertainment and television.

In the theatrical movie window, the international distributor and local agent agree on different terms when they transfer the rights including the amount of advertising investment, the number of copies of the movie in its release, the investment recovery and the royalties for the local distribution (Miñarro, 2013). In the classic windowing process, this was always the first window for Feature Films in all markets. However, nowadays not all Films are aired in theatres, some are aired directly to Video on Demand (VoD) platforms or even traditional channels.

The home entertainment window has also suffered changes. Until recent years, this referred exclusively to DVD rental and sales rights. Currently, in order to counteract the decrease in the income from DVDs rentals, and to a lesser degree sales, companies include VoD rights in this stage. These are released with a day-and-date strategy, which consists of starting a license period of two or more windows at the same time (Clares, Ripoll, & Tognazzi, 2014; Miñarro, 2013). This strategy aims to take advantage of a unified marketing campaign. All points indicate that the home entertainment window will be even more focused on the VoD rights becoming an essential stage of the windowing process in the future.

The television window is the main focus of this study. This is the third window for Feature Films and the first for television progammes including Serialised Fiction and TV Movies. In the classic distribution there are two sub-windows established within television: firstly the window for pay-TV channels, where traditionally first content is aired on premium channels followed by broadcast on regular pay-TV channels, and secondly, the free-to-air channels. Within their window, television broadcasters can currently acquire different types of rights during their license period. Besides the broadcast in the linear schedule, channels can purchase the catch-up rights, pay-per-view, near VoD, interactive television and adaptation rights (Chalaby, 2016b; Miñarro, 2013).

The price channels pay will be conditioned, alongside other things such as the level of competition on the local market or the rights acquired, by the exclusivity local broadcasters have for the programmes purchased. In this case, the term exclusivity means that while a channel has the rights for a programme, the distributor cannot have another active window in that territory. Another option for channels is the request for a holdback, which blocks the rights for the content in that territory for a specific time. For example, a channel can acquire a license period of one year and ask for two years holdback of the rights.

Another important aspect in the windowing process is the time passed between the different windows. While there have never been fixed terms transposable for all titles or markets, Clares and Tous (2012) established a general standard structure of the exhibition windows of Feature Films in Spain as can be seen in Table 1. Nevertheless, currently the windowing system is broadest as always since the forms of access to television content have diversified. Thus, distributors have more players to sell a window to and these are trade in different orders. Nevertheless, the windowing process is still detrimental to the television content value chain.

Table 1 - Audiovisual exhibition windows in Spain

Movie Theatre	VHS/DVD	VoD Rent/sale	Pay-TV Channels	Subscription VoD	Free TV	Free VoD
Theatrical release.	At 4 months from the theatrical release. Imposed by the lobby of exhibitors.	At 3 or 4 months from the theatrical release. There is variation of months depending on movie and contract and it is retired when the pay-TV window starts.	From the 4 or 6 months to the 16 or 22 months. With exclusivity.	When the pay-TV window closes (16 or 22 months, with variation depending on the movie and sometimes after the free television window when this is a producer or co-producer).	After the pay-TV window.	After the pay-TV window.
	Usually there are two months of rent before the pay-TV window and selling, but increasingly we encounter shorter Windows and the sale of the DVD at the same time as the rental, shortly after the theatrical release, in the case of the majors (before the 3 or 4 months mentioned).				In the case of Feature Films that have been sold in the pay-TV window.	

Source: Adapted from Clares & Tous (2012).

2.1.3. The content aggregation segment

Content aggregators, also referred to as exhibitors, are the third main segment of the transnational value chain and they are in charge of "bringing content together under the umbrella of a single brand and marketing it to audiences and/or advertisers" (Chalaby, 2016b, p. 43). In the multiplatform context this segment includes an increased number of services such as VoD platforms.

In order to fill their linear schedules or catalogues, exhibitors have two options, not mutually exclusive: a programme can be commissioned, produced in-house or by an independent producer, or they can acquire the rights to broadcast content. The focus of this study is on the second option, acquisitions, and specifically when exhibitors acquire the rights for imported productions, which as mentioned before, refer to the programmes that have been produced in a foreign market.

When acquiring the rights, content aggregators have to agree with the distributor the conditions under which a specific programme is bought. The main negotiation terms are the length of the license period (can include exclusivity or holdback), the rights acquired and the number of runs, which are "each one of the airs that is made of a certain title" (Miñarro, 2013, p. 58).

2.1.3.1. The television market as a 'buyer-driven' chain

The European television market has been characterised for being a 'buyer-driven' value chain where the marketers of the final products, in this case content aggregators, have the most strength. Thus, broadcasters have more power than independent producers as a consequence of their retailing work and their marketing skills being to attracting users (Chalaby, 2016a). In their marketing skills we can include aspects such as scheduling, presence on different platforms, capacity to attract advertisers or high quality algorithm to recommend similar content to VoD users.

Despite the relative strength of the main European broadcasters, at some points in broadcasting history the US majors, due to the high competition for their content, have had more power of decision in the negotiations. This has created a 'producer-driven' chain pushing channels to accept *output deals*, a type of package deal where a broadcaster is often forced to buy content from a US major that is not required in order to purchase the new releases.

2.1.4. The viewer segment

The proliferation of windows and content aggregators has also directly affected the last stage of the audiovisual content value chain, the viewers. Nowadays, viewers have access to a vast amount of content accessible through several platforms. This requires exhibitors to adapt more to audiences routines and preferences assuming that the viewers have an active role when deciding what to watch and how to interpret its meaning.

While it has been empirically proven as a fallacy, the first authors analysing media flows, defenders of the homogenisation thesis, were aligned with the audience theory of 'Hypodermic needle' or commonly referred as the 'Magic Bullet'. However, media content is received differently according to cultural and social aspects (Ang, 2001; Gripsrud, 1995; Liebes & Katz, 1990; Naficy, 1993; Stehling, 2013; Varan, 1998; Vassallo de Lopes, 2008, among others).

The paradigms perceiving an inclusive relationship between local and other cultures are associated with the 'active audience' thesis introduced by Morley (1993) from the cultural studies school. They consider that the appropriation of television content by the audience is an active process, which includes dialogue between the content and the local cultures without overlapping one another.

Assuming the active role of audiences, television programmes suffer 'cultural discount'. That is to say, cultural products lose some of the value they have in their home country when they are exported to a foreign market since the audience appeal is reduced due to social and cultural differences. Minor changes such as dubbing or subtitling also decrease their appeal (Hoskins, McFadyen and Finn, 1997). However, the earlier presence of US audiovisual content in most parts of the world, in theatre movies and television schedules, has helped to lessen the cultural discount of their products (Hoskins & Mirus, 1988). Despite not sharing language, borders or cultures, US programmes are a natural part of most local media systems.

Straubhaar uses the related phenomenon of 'cultural proximity' to describe how audiences actively decide what kind of programme to consume: global, regional or local content and argues that audiences make "a choice that favours the latter two when they are available, based on a search for cultural relevance or proximity" (1991, p. 39). Initially, it was proposed that the main factors influencing cultural proximity were language and culture similarities. Straubhaar (2008) soon suggested that there are further factors that can cause a feeling of 'cultural proximity' such as trade, migration, travel and geographic adjacency.

Furthermore, cultural proximity is based on sharable aspects like constructions of meaning and common cultural symbols, which enables them to identify with those contents (Singhal & Svenkerud, 1994; Singhal & Udornpim, 1997). This widening is linked to the idea of multi-layered identities where an individual can have different layers of identities at the same time: local, national, regional, global, etc. (García Canclini, 2001; Straubhaar, 2008). One level does not eliminate the other and for example, US programmes have become cultural products that have cultural proximity with a transnational identity layer to a significant part of the world. Nevertheless, local audiences broadly prefer local television productions when available (Buonanno, 2002; Prado, 1999; Singhal & Svenkerud, 1994; Straubhaar, 2013).

2.2. Acquisitions Executives as cultural intermediaries

The middle-range approach allows us to discuss the processes that happen in between the production of a foreign programme and the consumption of it by part of the local audiences. The acquisitions departments of local television companies act as mediators for the "economics imperatives of transnational media conglomerates and the fickle viewing pleasures of audiences worldwide" (Havens, 2006, p. 1). Their role is to acquire the international content that each channel will later broadcast. Therefore, they fluctuate between the transnational and the local field of television. That is to say, they have to appreciate the requirements of their local environment and uncover them on the transnational market.

Therefore, these local mediators are 'cultural intermediaries'. This concept was firstly introduced by Bourdieu in the 1980s and was defined as:

> The emergence of a new faction of the middle class or new petit bourgeoisie which is engaged in all the occupations involving presentation and representation (sales, marketing, advertising, public relations, fashion, decoration and so forth) and in all the institutions providing symbolic goods and services (1984, p. 359).

This author had a romantic idea of the concept arguing that cultural intermediaries followed their personal taste when legitimating goods. Furthermore, he considered that they were influencing the audience they were part of and they could be a role model for. This vision has been highly criticised in the era of consumerism due to the seeking of profit that cultural intermediaries have (Kuipers, 2012). Another aspect that has been considered to be arguable is the fact that he considers them 'new' occupations (McFall, 2002). There have been cultural predictors for a long time, what perhaps has changed is the technological devices they use.

Another term that has been used to talk about cultural mediators is 'gatekeepers' which is mainly used to talk about the production of news (McQuail, 1994; Negus, 2002). This concept questioned the idea that news was an open window to the real world. However, this belief assumes a passive role for the gatekeeper since they only decide what to let in and what to keep out of the news already in the gate. The term 'cultural workers' has also been used as a neutral form to refer to these types of professions (Smith Maguire & Matthews, 2010).

Notwithstanding the criticism of the concept of cultural intermediaries, this term has been most used to discuss the workers that are at the centre of cultural processes regarding entertainment (Baker, 2012; Childress, 2012; McFall, 2002; Negus, 2002; Smith Maguire & Matthews, 2012; Wright, 2005) and specifically television (Havens, 2006; Kuipers, 2011, 2012, 2015; Sinclair et al., 1996). However, the broad use of the concept can entail confusion on the limits of the professions that act as cultural intermediaries. Smith Maguire and Matthews (2012), in the editorial of a special issue of the *European Journal of Cultural Studies* covering this topic, described three specifications that all intermediaries have.

Firstly, their work consists of framing goods including products, services, ideas and behaviours and by identifying them, they legitimize them. Secondly, their expertise differentiates them from other professionals framing goods and they do not significantly rely on their personal tastes but on their professional knowledge. Thirdly, they impact and influence how audiences perceive the cultural products framed. Furthermore, they have the power to legitimize or marginalize cultural products to their audiences.

With these specific points, we can conclude that cultural intermediaries work in the middle of cultural flows and mediate between producers and consumers with great power to influence an audience with their tastes and what they have access to. In other words, they are the ones who decide what is good enough to be present and available having the strength to influence the tastes of the consumers. This new definition differs from the initial idealization of Bourdieu. The main differentiation is the separation between personal and professional judgment but nowadays cultural intermediaries do not always engage with what they professionally recommend (Havens, 2006; Kuipers, 2012; Smith Maguire & Matthews, 2012).

Television buyers are a clear example of the professionalism of cultural intermediaries. Their role is to buy international programmes that will appeal to their audiences taking into consideration their professional knowledge of the markets. Empirical studies have found that Acquisitions Executives, from different local markets, share aesthetic standards. The quality standards present across regions include the perception of high 'production values'; programmes which audiences can relate to; and a balance between innovation and similarity (Bielby & Harrington, 2008; Havens, 2006; Kuipers, 2012). Another characteristic of Acquisitions Executives as cultural intermediaries is not only that they mediate between production and consumption but also between two other poles: transnational and local markets. Their professional knowledge involves the market characteristics of both business levels.

This high level of professionalism, with standardisation and shared routines, implies that television buyers form a 'professional class' (Sassen, 2001). These workers have also been referred to as a 'cosmopolitan tribe': "a highly networked group of transnational professionals with similar standards, values, manners and even rituals such as annual gatherings in Cannes" (Kuipers, 2012, p. 588). This concept evokes images of the global cosmopolitans introduced by Hannerz (1990).

Local Acquisitions Executives are at the heart of the acquisition process mediating between economic and cultural tensions. They are buyers for the transnational distributors and 'sellers' to the scheduling teams of their local channels. Thus, they have direct influence over which type of imported programmes are broadcast on their local channels, influencing the transnational television flows. Studying the role they play in the acquisition of foreign canned television programmes is essential to fully understand the quantitative presence of international programmes in local schedules and also the economic and other forces that influence television exchanges.

2.3. Conditioners of the acquisition process

In this section, the aspects that influence channels and their Acquisitions Executives during the acquisition process will be summarized. The main aspects discussed by media researchers are the intrinsic characteristics of audiovisual content, their origin and the prices. Another influencing factor is the schedules of the channels, which will be thoroughly analysed in the following chapter.

The first factor determining transnational television flows is that certain genres circulate more than others. “The most popular genres are drama and film, followed by children’s programming, especially animation; light entertainment, a catch-all category that includes talk and variety shows, as well as unscripted ‘reality’ shows; factual programming, including educational; and television movies” (Havens, 2006, p. 41). Nevertheless, in general terms, those genres which are more expensive to produce are acquired while the cheaper are commissioned locally since all decisions have an opportunity cost (Doyle, 2002).

With finite resources, an imported product reduces investment in either other acquisitions or commissions. Most broadcasters, with some exceptions in the public corporations, will choose investments that will generate the most productive outcome. Therefore, economic aspects are at the top of the considerations when acquiring imported content.

Nonetheless, television content is also considered a cultural good and all aspects of the process are conditioned by the characteristics of this kind of products. Thus, aspects of television transactions are part of a cultural economy which “is concerned with how media operators meet the informational and entertainment wants and needs of audiences, advertisers, and society with available resources” (Picard, 1989, p. 7).

The first main intrinsic characteristics of television products as cultural goods are that they suffer cultural discount, as seen before, and they do not have as much appeal in a foreign market as in its own. Concurrently, they also suffer temporal discount because interest decreases the more time passes from its premiere. The second characteristic is their capacity for joint-consumption or public good because viewing by one person does not diminish the enjoyment of others. This characteristic facilitates the exploitation of economies of scale, which usually benefits the biggest players. Finally, they may have external benefits other than for the producer or distributor. The positive side-effects are social impact on the audience such as educating or raising awareness of certain topics (Doyle, 2002; Hoskins et al., 1997, 2004; Owen & Wildman, 1992).

2.3.1. Origin

The origin of a programme is highly relevant when attracting the attention of content aggregators and it usually conditions the production routines and the cultural point of view of the content. Traditionally, as previously seen, international television flows have been dominated by a small number of territories. Some local television markets have some advantages in the transnational television flow and those can be inherent to the territory, due to endowment of the cultural industries or more recent specializations.

When we consider the hegemonies in television trade there has been extensive discussions concerning the advantages of the US market over the rest of the world. The main reasons for the hegemony of this territory since the beginning of the medium are: large local market with a high rent per capita that facilitates economies of scale; the historical development of the US audiovisual industry and the Hollywood hub of talent; production in English, the second most spoken language in the world with the English-language countries forming the richest regional television market; the high competitiveness of their local market; the length of their productions; and their marketing skills (Doyle, 2002; Hoskins et al., 1997, 2004; Steemers, 2004).

However, the US position in the television industry is not as hegemonic as in movie theatres. Furthermore, it is not the only local television market with advantages in international trade. For example, Japan is well known for its Animation Series and sells products worldwide. The UK has a reputation for its high quality costume dramas (Hoskins et al., 2004). Denmark is now for their high quality Nordic Noir crime Series (Jensen, 2016). Other examples are Mexico and Brazil which specialize in *telenovelas* (La Pastina & Straubhaar, 2005; Vijnovic, 2008). Concurrently, some Western European markets are at the forefront of the format trade such as the UK and the Netherlands (Chalaby, 2010). Furthermore, it also has to be mentioned that some territories have big exporters within their regional market, for example the products from South Korea in the Asian television market (Kim & Park, 2008). This is a consequence of cultural proximity and cultural discount that television programmes suffer.

Notwithstanding the greater diversity in the origin of imports in the television market, there is a major distinction between the US advantages and the advantages of other territories. Specifically, other countries are usually known for their specialisation in a certain genre while the US stands out for its whole industry giving the ability to force output deals and offer lower prices when convenient.

2.3.2. Prices

As previously stated, economic factors are at the top of the influential factors when deciding what to acquire or commission. First of all, we have to distinguish between buying through acquisitions and through commissioning. When international content is acquired, the cost of that product has already been paid for by the local market and the sales to other territories form part of the marginal returns. Thus, only the rights to broadcast the programme (in a territory, during a limited period and a certain number of times) are acquired. Contrarily, when commissioning a programme broadcasters always have more control over it (Doyle, 2002; Havens, 2006), even if the channel does not keep all the rights for that content.

This differentiation having been made, imported content has been characterised as having a lower cost than ordering local content explaining why, for example, channels fill most of their schedules with imported programmes at the initial stage. In addition, the price closely conditions how channels use imports in their scheduling strategies. Nonetheless, acquisition prices vary significantly over the different local markets and depending on the original market selling the rights.

For example, the US has the capacity to offer lower prices than other markets, when it is in their interest, which has led to accusations of dumping their prices (Jin, 2007; Ruvalcaba, 2007; Waisbord, 2004). Dumping refers to the unfair trade strategy of selling products below its production cost. At the same time, due to the high levels of competition in acquiring their products in local markets, prices can be increased if desired.

2.4. Partial conclusions: Local Acquisitions Executives influence on the transnational television flows

Local television markets are allocated in an increasingly transnational television value chain that we consider is formed by four different segments: producers, distributors, content aggregators and viewers, all having an effect on the structure of transnational television flows. The main objective of this research is to study these flows focusing on often overlooked stages: the acquisition and the scheduling processes from the point of view of local content aggregators.

The production stage offers different options to the exhibitors when filling their linear scheduling or their catalogues. For the aims of this dissertation, the different types of production have been divided between local, imported and co-produced establishing this classification considering the geographic source of the content. The focus will be put on imported programmes, those that are acquired by the local broadcasters from a foreign territory.

The second stage, distribution, also influences the acquisition process since the different types of distributors such as US majors or independent companies have different relationships with the aggregator altering the importance of each part of the negotiations. Content aggregators, the third segment, are the main focus of the dissertation because of their role in mediating between international distributors and local audiences. Therefore, exhibitors are also conditioned by viewer preferences in order to appeal as widely as possible. Therefore, within the practices behind the acquisition process it is highly important to consider that audiences are attracted more to local content because of the sense of cultural proximity (Straubhaar, 2013; Straubhaar, Fuentes, Giraud, & Campbell, 2003) meaning that programmes from external territories suffer cultural discount (Hoskins et al., 1997). However, the early presence of US content in television schedules in most parts of the world cannot be ignored because it has stimulated a close relationship with local viewers.

In the acquisition process of canned imported television programmes, the Acquisitions Executives of local broadcasters act as cultural intermediaries (Bourdieu, 1984; Kuipers, 2012; Negus, 2002; Smith Maguire & Matthews, 2012) since they frame imported programmes for local viewers. These executives form a transnational professional class with shared values (Sassen, 2001) that mediate between the interests of the distributors and the viewers directly conditioning the imported programmes that local audiences are exposed to on general-interest channels.

The main factors influencing their decisions are the intrinsic characteristics of audiovisual programmes such as the temporal discount of audiovisual content, their origin and the price. Concurrently, the active role that Acquisitions Executives play in mediation helps to create or maintain the inequalities in television flows since they legitimize or marginalize certain kinds of content. This role has often been overlooked in the analysis of transnational television flows.

3. SCHEDULING: FROM LINEAR TO CATALOGUES

The following chapter will consider the characteristics of television in the current digital context resulting in, among other changes, in the increase in the number of content aggregators, which will be divided between linear and Video on Demand. First, the role of schedules and the presence of imports in linear television will be studied. Second, since one of the specific objectives is to unveil the online strategies used by traditional broadcasters regarding imports, the different types of audiovisual online platforms and the online strategies of broadcasters will be presented.

3.1. Still television? Television as a broader concept

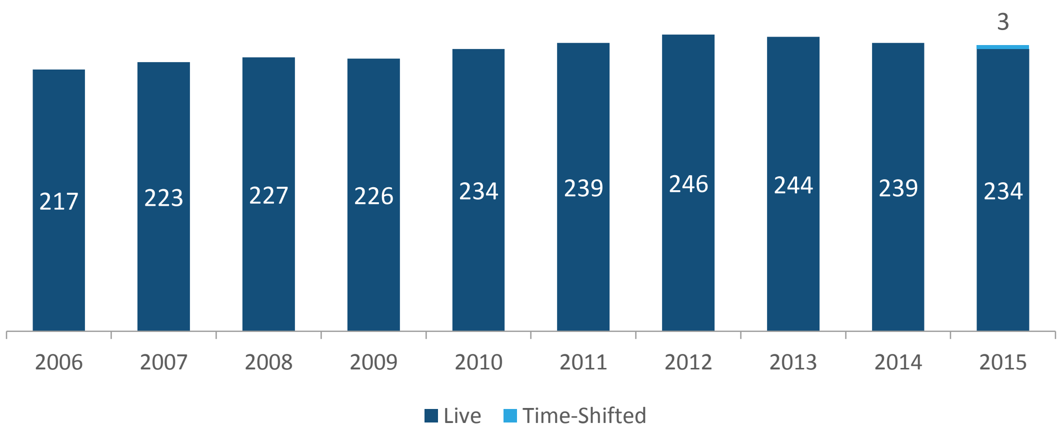
After the establishment of the medium, television has had a major role in societies. "Television was the central element in the media-based public sphere in the second half of the twentieth century. It gathered by far the largest audience; it was the medium that all other forms of public communication had to relate to" (Gripsrud, 2010, p. 3). However, this role has been questioned by some authors who have predicted the death of television as a consequence of new technologies. Nevertheless, fears that an older media will disappear always arise when a new form of media is released. Thus, it is not a unique fear that the Internet will eradicate television (Cha & Chan-Olmsted, 2012; Prado, 2015).

Furthermore, signs of the death of television have not been apparent up to now. First of all, broadcasting is still the hegemonic mass media being the only one able to attract a mass audience to watch one programme in the same local market. As can be seen in Charts 1 and 2, linear television viewing has not decreased significantly over recent years in Spain and the UK. Furthermore, time-shifted viewing[2] is beginning to be accounted for by television industries. The Broadcasters Audience Research Board

[2] Viewing during the next seven days after their linear broadcast.

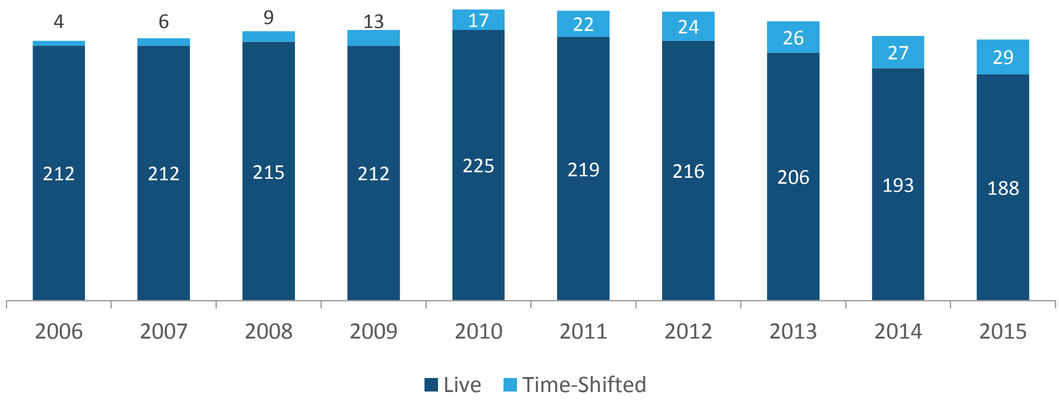
(BARB) has included this figure for the UK market for several years while in Spain this only began to be counted in 2015. Second of all, advertising is still centred on television with an increase in advertising income in both countries (Tables 2 and 3). Not knowing what will happen in the short and medium term and acknowledging that younger audiences consume less (traditional) television (Tables 4 and 5), it can be confirmed that television is still at the centre of the media scene and plays an important role in the Spanish and British societies.

Chart 1 - Spain, average minutes of television viewing per day



Source: Barlovento Comunicación (2017).

Chart 2 - UK, average minutes of television viewing per day



Source: Ofcom (2015c, 2016).

Table 2 - Spain, average minutes of linear television viewing by age in 2015

4 to 12	13 to 24	25 to 44	45 to 64	> 64
137	129	193	284	343

Source: Barlovento Comunicación (2016).

Table 3 - UK, average minutes of linear television viewing by age in 2015

4 to 15	16 to 24	25 to 34	35 to 44	45 to 54	55 to 64	> 64
111	124.2	162	194.4	239.4	236.4	342

Source: BARB (2016).

Table 4 - Spain, net advertising revenue of the television industry

	2010	2011	2012	2013	2014	2015
Linear TV*	2471,9	2237,2	1815,3	1703,4	1890,4	2011,3

*In millions (euros)

Source: Infoadex (2015, 2016).

Table 5 - UK, net advertising revenue of the television industry

	2010	2011	2012	2013	2014	2015
Linear TV*	3,5	3,6	3,5	3,7	3,8	4,1
Online TV**	66	75	92	121	156	159

*In billions (pounds)

**In millions (pounds)

Source: Ofcom (2016).

However, the audiovisual sector is changing rapidly and more platforms are competing for viewers' time. The relationship between television and the new platforms has been studied through the 'remediation theory' (Bolter & Grusin, 1999) which considers that new media is only remediating the old media, that is to say, presenting the same process in another way, which has happened since the beginning of the arts.

Another way to study this phenomenon is with the 'uses and gratifications' theory. "Uses and gratifications posits that people select and use a medium over others to gratify needs and purposes" (Cha & Chan-Olmsted, 2012, p. 262). Thus, users will only substitute completely linear consumption for online viewing if offered the same gratifications. According to the authors, these two methods of consumption have different purposes and gratify the users at different levels. Therefore, they are more complementary than auto-exclusives.

Overall, while television is not dying and it is not going to in the short or medium term, technological advances have made it more difficult to define the television medium questioning the limits of the television sector. Before digitalisation, these limits were clear because the platforms for distribution were restricted by technology. However, in the digital context, television content can currently be distributed across many different platforms. Moreover, it can consumed within a linear schedule or an on-demand catalogue.

Thus, convergence is an increasingly dominant reality. Jenkins defined it as "the flow of content across multiple media platforms, the cooperation between multiple media industries and the migratory behaviour of media audiences who will go almost anywhere in search of the kinds of entertainment experiences they want" (2006, p. 2). Without relying exclusively on the technological situations that have facilitated convergence, Jenkins believes that the term covers three different aspects: participatory culture, collective intelligence and media convergence.

The term participatory culture contrasts with older notions of passive spectators. This concept leaves aside the word audience which evokes a multitude of people without individual characteristics of their own and isolated from one another. This is in contrast to participants who interact with each other according to a new framework of rules that are still in the process of being understood. That is to say, the word participants assumes a high level of interaction by the individuals. However, although currently any person can have a communication platform that reaches a large number of people, traditional mass media companies still have more power than the other Internet agents and maintain their ability to control and prescript relevant information.

Jenkins defines the second aspect of convergence, known as collective intelligence, a term proposed by the French cybernetic theorist Lévy (1995), as the pooling of the individual knowledge and skills everyone has creating an overall buzz surrounding the media consumed (Jenkins, 2006). Social networks have become the platform for commenting and discussing television content. While in Facebook there are fan communities of programmes, Series, hosts, actors, etc., most Twitter conversations occur while programmes are being broadcast in the linear flow (Buschow, Schneider, & Ueberheide, 2014).

Ultimately, media convergence implies that "every story gets told, every brand gets sold, and every consumer gets courted across multiple media platforms" (Jenkins, 2006, p. 3). Information is accessible through different media and platforms where broadcasters try to have the most viewers in all of them. Furthermore, while traditional audience data continues to maintain an important role in the industry, online viewings are increasingly being taken into account.

Digital convergence is not the only aspect that has produced profound changes in the television industry. Prado (2015) divides the story of the media into four different stages characterised by the different devices of production, distribution and reception, and the changes in their contents, which produce changes in the social functions of the media. The first phase, 'analogue terrestrial', goes from the launch of the medium to the 1980s when television constituted itself as a mass media and all the essential characteristics were shaped. 'analogue multichannel' is the second stage, which occurred between 1981 and 1995, when television saw the first expansion of channels and new distribution systems appeared such as cable and satellite. In the 'digital multichannel' phase (1996-2008) the formerly analogue platforms were digitalized and there was an exponential proliferation of channels.

The last and current stage is the 'all digital and fully networked' and is characterised by the digital switchover, firstly in the US. The Internet has become a platform for audiovisual content and is the main element present online. At this stage, television still remains at the centre of the audiovisual media, using both old platforms that have been digitalized and new platforms. In this convergent television universe the main characteristic is that audiences can access content through a variety of platforms. This has made broadcasting companies adopt cross-media strategies.

The increasing complexity of the media has also been captured by Curtin (2009) as the matrix era, which he considers started in 2007. Furthermore, one of the main characteristics of television in recent years is the significant increase in the amount of content available, reaffirming the idea of the 'era of plenty' presented as early as the beginning of the millennium by Ellis (2000b).

Table 6 - Convergent television universe

Digital Television	***Video over Internet Protocol***	
Terrestrial *Cable* *Satellite*	*IPTV* *Localised conditional access*	*Over the Top (OTT)* *Open internet*
		Global conditional access

Source: Adapted from Prado (2015).

3.1.1. Television content

A key aspect to define the limits of television is to know what is television content. Television "exists primarily as a metaphor [...] What we habitually refer to as television – that is, professionally produced video programmes in standardised forms and genres – is now routinely distributed on multiple platforms simultaneously" (Kompare, 2010, p. 80). However, there is a lot of video content on the Internet leading the need for a classification.

According to Cha, two general types of online videos can be found: "branded videos, which are originally produced by media companies, and unbranded videos, which are produced by individual Internet users (i.e., user generated videos)" (2013, p. 73). Marshall (2009) presents another classification arguing that there are three different types of forces that are competing and overlapping in the online video sector. The first kind, user generated content (UGC), is fighting for the democratization of video production. The second kind is content coming from the television industry showcasing their quality standards over the UGC videos. Lastly, the third type is controlled by the new online industries (Google, Facebook and YouTube) trying to gain revenue. In this classification only the second category refers to branded content, since companies like Google, Facebook and YouTube do not have editorial control over their content.

Meanwhile, the EU limits the scope of the new broadcasting directive (AVMS Directive) to platforms offering television like programmes. In addition, the EU established seven characteristics all services under the scope of the directive have in order to limit the television market. Firstly, services do not necessarily have to seek economic profit but have to compete. Secondly, the company has to have editorial responsibility over the contents that are made available to the audience, which leaves out services that are based on UGC like YouTube or Vimeo. Thirdly, it has to supply programmes which are defined as "a set of moving images with or without sound constituting an individual item within a schedule or a catalogue established by a media service provider and whose form and content is comparable to the form and content of television broadcasting" (Article 1(b)). Fourthly and directly related, this has to be the main purpose of the service and thus excludes online services that do not come from broadcasting such as newspapers and radio online services. Fifthly, these programmes have to inform, educate and entertain. Sixthly, it has to be intended for the general public, even if it is a pay service. Finally, the seventh characteristic is that the service has to transmit by electronic communications networks, which includes cable, microwave, satellite, Internet or mobile networks (Lange, 2014).

Therefore, these definitions confirm that it is still accurate to use the term television but a broader definition must be considered. In addition to linear broadcasters, online platforms offering branded television-like content are included in the television market despite having an online transmission and a non-linear schedule. Television has passed from a technological platform to a multitude of platforms causing a diversification of form in which audiences consume television.

VoD services and also time-shifting devices like Digital Video Recorders (DVR) have produced new method of watching television not linked to the linear schedules of traditional broadcasters. These new platforms have made a higher degree of individualization possible in the habits of users. Nevertheless, this type of consumption is not the only one in the current era. Different types of consumption overlap and we encounter massive, fragmented, segmented, micro, personalized, individualized and connected audiences (Prado, 2015). This combination of old and new consumption habits reflects the diversification of television.

Having discussed the current universe of the television market, which is characterised by the multiplatform context and the constant introduction of new technology, the following sections of this chapter will address the two main methods of television: linear television and on-demand. While the first section will be concerned with the scheduling process and the presence of imports, in the latter the types of VoD will be discussed focussing on the online platforms of traditional broadcasters and their strategies.

3.2. Linear television

During the public monopoly era, scheduling was not a central consideration for channels. This changed with the launch of commercial broadcasters and the increase in competition (Ellis, 2000b; Kennedy, 2002; Reddy, Aronson, & Stam, 1998). “Central to traditional, linear television in Europe—both public service and commercial—is that it gives structure and flow to television output by means of scheduling and continuity techniques” (Van den Bulck & Enli, 2014, p. 449). The new multiplatform context is putting pressure on the importance of this statement.

Some authors, wedded to the idea of the end of broadcasting or post-television, consider that schedules are not relevant in the era of 'all digital'. As early as 2004, Marshall considered it was a characteristic of the old television economy but not valid for the current context of fragmented audiences. Lotz also diminished the importance of scheduling and considered that it was "already possible to imagine a period in the not-too-distant future when linear schedules recede as a dominant structuring frame of television" (2007, p. 116).

In order to evaluate the importance of schedules, firstly it is important to have a clear understanding of its meaning. Many definitions of scheduling exist depending on where the emphasis is made but the action of programming always has "implications of social, economic, cultural and productive aspects" (Arana, 2011, p. 66).

In general terms, the act of scheduling can be explained as the creation of a temporal sequence in which programmes are ordered. According to Westphalen and Piñuel, it consists of "the selection of different programmes establishing an order of broadcast" (1993, p. 1093). A similar idea was presented by Palacio defining scheduling as "the practice of placing, under a certain sequence, programmes of a certain duration in the grid of a channel" (1989, p. 38). Contreras and Palacio talk about different levels: the first one is for the programmes and the second is "the coordination and ordering of programmes of a certain duration to a specific structure" (2001, p. 27).

While these definitions talk about individual programmes one after the other, there are other opinions that consider schedules as a whole, which gives its own discursive units to each channel. Cebrián, as far back as 1978, stated that "is the continuity of broadcasting which makes it possible to talk about schedules more than specific programmes" (1978, p. 250). In a similar way, Ellis considers that "scheduling defines the basic choices which define a broadcast television service" (2000b, p. 25) . Therefore, schedules are units of meaning that directly construct the brand image of a channel, but this is "determined not just by the relative proportion of different genres in the entire output (the paradigmatic axe) but also by the actual position the programmes take up within the schedule (the syntagmatic axe)" (Van den Bulck, 2009, p. 321). The distribution of programmes across the slots is determinant and conditions the unit of significance of the schedules.

Placing the focus on the audience, some authors emphasize the contractual relationship established by the audience and the broadcasters. To Paterson, a schedule "forms a framework with which the viewer becomes familiar, so that s/he returns to watch a program at a known time every week" (1990, p. 31). With a similar vision, schedules have to contain contents suitable for the audiences so they watch that channel. "By scheduling, it must be understood the appropriateness of some content in the form of contents to the potential audience the channel aims, reaching at the same time an economic amortization" (Cortés, 1999, p. 116). Eastman and Ferguson talk specifically about commercial television: "*the primary goal in programming advertiser-supported television is to maximize the size of an audience targeted by advertisers*. The only way to accomplish this goal is to satisfy the needs and wants of that audience" (2006, p. 2). Therefore, for these authors the key aspect of scheduling is understanding the audience.

As can be seen, there are three different focuses when defining the concept of scheduling. The first defines schedules as the planned order of programmes. This basic point of view is used by those defending that scheduling is not important in the current context, or will not in the near future.

> It is almost as if we were back in what Europeans recognize as the early monopoly phase, when schedulers and scheduling were marginal to television, and individual programmes were offered as distinct entities with little systematic attention as to how they would fit together (Ihlebæk, Syvertsen & Ytreberg, 2014, p. 3).

The second point of view remarks how the order of programmes creates a general structure that conditions the channel's identity. Lastly, the third point of view considers that scheduling aims to create a programming which appeals to users so it can be economically amortised.

The mixing of the last two ideas creates a broad approximation of the concept of scheduling. We will define it as the construction of a flow of content which generates a specific identity for the channel with the intention of appealing to users and generating economic value but also social and cultural. Remarking that linear television is still hegemonic in terms of television content consumption, it should also be considered that linear schedules are still an important aspect of the current television context. For instance, as will be described in the following section, not all the new methods of consumption exclude linear television and lean toward the individualization of consumption. It has to be seen if in the future schedules do lose their roles, but it seems to be unlikely in the short or medium term.

Despite not losing its importance, the role of scheduling has suffered some qualitative changes in recent years as a consequence of the new methods of distribution and consumption. With the study of cross-platform scheduling of Norwegian channels and interviews with the schedulers, Ihlebæk et al. concluded that scheduling has not lost its importance but has widened its reach: "Schedulers, and everybody in the corporations, have to 'think multi-media,' 'think interactivity,' and to always consider the overall brand" (2014, p. 14).

3.2.1. New opportunities for linear television

Convergence has not exclusively had negative effects on linear broadcasting. In recent years, the simultaneous use of second windows has increased the relevance and strategic role of live television. "More customers are 'multitasking' using different media simultaneously" (Cha, 2013, p. 72). According the Sørensen (2016), the British Broadcasting Corporation (BBC) and Channel 4 use live programmes as a core value for their strategy since live television is a distinctiveness traditional broadcasters have over VoD services. Consequently, both channels highlight their sports events, reality shows and galas.

These live programmes increase the need to watch via linear scheduling because they can be commented on through social networks. Notwithstanding the increasing fragmentation and therefore individualization of the market, social networks are changing how users experience television content.

> These moments of socialising can happen online as one's viewing behaviour is shared on Facebook or tweeted. Thus, viewing behaviour (and consumer behaviour) is projected as part of one's (online) identity and can be commented on by others. Furthermore, the 'watercooler' moment in other social interactions is hardly gone as viewers are still likely to discuss their viewing experiences, despite the fact that these are not synchronized (Jenner, 2016, p. 268).

Thereby, while there are forces puling for the individualization of audiovisual viewing, others reinforce the socialization of the content. This use of social networks has produced the need to measure the social audiences. In Spain, the company *Tuitele* started to measure social audiences in 2012. Two years later it was bought by Kantar Media, which also collects linear audience data.

3.2.2. The scheduling process

As previously defined, scheduling is the process followed by the content aggregator to create a content flow with a specific identity to connect with the viewer and increase the value of the goods in the television value chain, both economic and cultural. Due to the importance of scheduling, the directive of the corporations sets the scheduling department's general guidelines to fill the grid. "The specification is in terms of budget, genre, target audience and likely public image" (Ellis, 2000b, p. 132). In addition, there are several factors, internal and external, that affect the scheduling process, some more directly than others, as listed by several authors.

Eastman and Ferguson (2006) highlight the external elements of technological innovations, with convergence as the predominant; the economic context; the ownership of the channel; the regulatory framework; and ethical decisions. Vane and Gross (1994) also consider that sponsors and advertisers, lobbyists, critics, academic studies and external consultants are also key external elements influencing schedulers. Furthermore, these authors acknowledge a number of internal factors that influence the channel: the potential sale of programmes, the finance department, the broadcasting standards of the country and lastly the directives of the channel.

For Ellis (2000a), schedules are being 'attacked' by competing channels, the emerging competitors such as VoD platforms, the minority channels, the universe of the local market, the living and viewing patterns of the users they aim at and the demands on leisure time in general. Arana (2011) presents a vast and extensive list of factors, classifying them according to their relationship to the communicator, the message or the receiver as displayed in Table 7. The diversity of factors mentioned by these authors demonstrates that schedules are influenced by external context in the local and transnational market and by the particular characteristics of each channel compelling them to adapt to new situations.

Table 7 - List of factors influencing the schedules

Communicator	Message	Receiver
Audiovisual legislation	Accessibility of the different programmes	Social habits
Advertising legislation	Type of scheduling grid	Television consumption
Technical regulations applied to the transmission	Activity of the competitors	Equipment
Socio-political situation and the television system	Cost	Trends/test
Geographic coverage of the signal	Seasonality, Schedule, date and duration	Ideology
Funding	Advertising appeal	Socio-demographic profile
Ideological/philosophical criteria of the channel	Content and format	Activity of the competitors
Number and characteristics of the different channels	Life Cycle of the program	
Productive resources	Channel definition	
Budget	Present situation	
Contracts, rights for content, etc.		

Source: Adapted from Arana (2011).

3.2.3. General-interest channels

While all these elements affect all types of channels, scheduling strategies are directly conditioned by the main aim of each channel. Generally speaking, it is possible to distinguish between two types of channels: generalists and thematic. General-interest channels offer a varied schedule with a diversity of genres aiming to appeal to all kinds of users, despite not necessarily all at the same time. In contrast, thematic channels usually specialise on a small number of genres and seek to satisfy a specific group of people (Arana, 2011; Eastman & Ferguson, 2006). All the new portfolio channels of traditional broadcasters are included in this second category.

This research is focused on free-to-air general-interest broadcasters, specifically the prime channels of the main corporations of Spain and the UK. Therefore, the channels analysed are theoretically aimed at all users in their local market by displaying a variety of genres and content in their grids.

Furthermore, both markets have public and commercial channels. The nature of the channels directly affects the scheduling compositions, especially since the main public corporations of both markets have no advertising in their schedules. Thus, "the presence or not of adverting in a television channel is a factor that greatly affects the viability of the programmmes and their permanence in the scheduling grids" (Arana, 2011, p. 70).

However, both public and commercial channels in these two local markets operate with high levels of competition. As a consequence, channels plan their schedules in depth with great analysis of the schedules of their direct competitors resulting in minute by minute decisions of when to start or end a programme or when to go to commercials. This situation also leaves channels with a small margin of error, contributing to the cancellation of programmes that are not successful after a few runs (Havens, 2006).

3.2.3.1. Linear and circular scheduling flows

One of the main characteristics of the schedules of the generalist channels is the aim of gaining as many viewers as possible and retaining them for the channel. As early as 1974, Williams established the concept of 'television flow', focusing on the three main US networks. This particular use of the term flow, not to be confused by the transnational television flows produced with programme exchanges, illustrates that scheduling techniques must ensure a natural transfer of the audience from one programme to the following (Webster, 2006). This phenomena has also been referred to as the principle of 'adjency' (Owen & Wildman, 1992).

As schedules are still relevant, the scheduling flow is important to retain audiences throughout the day. However, the linear flow is not in itself enough to compete in the multiplatform context. "Today's flow is more circular, with one platform encouraging viewers to access another, which, hopefully, prompts them to return to the on-air text" (Gillan, 2010, p. 76). Therefore, broadcasters have to make their schedules accessible to different platforms and create a coherent brand image across all. The content available in their online catalogues is part of their own schedule and the linear flows have to be included in the overall circular flow. "Rather than indifferently transmitting a lineup of shows each evening, television companies now operate in an interactive, asynchronous intermedia milieu. They build brands and render them accessible to audiences in a range of formats across rolling time horizons" (Curtin, 2009, p. 19).

In the case of VoD only platforms, while these services do not have a linear schedule, they have to use their catalogues to establish a brand image. They do not have a linear flow as presented by Williams (1974) but there has to be coherence in their catalogues to create a circular flow so viewers can navigate from one piece of content to another. Thus, recommendation algorithms are very important to these services to retain viewers.

3.2.3.2. Scheduling strategies

Time is the main consideration when structuring and planning schedules. "Scheduling decisions are based upon the number of households viewing television in a given day-part, and what the general make-up of that audience is" (Havens, 2006, p. 122). Schedulers adapt their decisions to the type of user most present in each part of the day. Since our sample is formed of general-interest channels, their schedules adapt to appeal to different groups of users in each time slot.

The adjustment to these specific targets can be done in detail since "with the size of sample and techniques now used for audience measurement, audiences can be specified according to age, class, gender, region, pattern of viewing and even by their degree of appreciation of the program" (Ellis, 2000a, p. 28). Furthermore, online viewing has increased these measures exponentially making it possible to have detailed data for each user.

In the linear schedule, day flows are divided into several time slots reflecting the daily routines of the local market. Thus, the channels adapt to the characteristics of the viewer watching television in every slot of the day. While there are more slots, days are divided into two main blocks: Day Time and Prime Time. The Prime Time slot is the most competitive for generalist channels and is crucial to their overall outcome. "It has been long understood that the size of the prime-time television audience is affected by the amount and type of competing programmes, the amount of viewing inherited from preceding programmes, and the compatibility between adjacent programmes" (Eastman & Ferguson, 2006, p. 19).

Consequently, scheduling strategies, and transition strategies in specific, are important all day but are essential for the Prime Time slot. The classic transition strategies in the schedules are gathered in Eastman and Ferguson (2006), which include anchoring, leading-in, hammocking, blocking, linchpinning, counterprogramming, blunting, stunting and seamlessness. These strategies are used to reinforce the schedule flow so that viewers do not switch to another channel.

To a lesser extent, these strategies are also used in the Day Time slots. However, these slots are mostly utilised to create a habit in the viewer. That is to say, to encourage daily meetings in their routines. The strategy to schedule the same programme at the same slot each day of the week (usually from Monday to Friday) has been presented as *striping* (Eastman & Ferguson, 2006) and has the aim of creating a horizontal flow to bring the user every day at the same time. This strategy has also been referred to as *horizontal scheduling*, in contrast to the vertical scheduling in which the daily flow of each channel appears (Castelló, 2005; Contreras & Palacio, 2001).

Schedules are also conditioned by the day of the week. Television consumption is higher during weekdays (with the exception of Friday night) than during the weekend conditioning the strategies of the channels. Together, the scheduling flows of each day conform to the weekly flow. At the same time, the different weeks compose the television seasons, which usually run from September to June (Castelló, 2005).

The season schedules of channels have to combine two opposing characteristics; to be structured but also flexible. On the one hand, structure is needed to give stability and predictability to users, which is achieved by the *striping* technique and with the weekly Prime Time appointments. This also helps broadcasters to set their grids months in advance so the commissioning and acquisitioning processes and the license periods for their imported programmes can be timed (Havens, 2006).

On the other hand, schedules have to be flexible enough to adapt to new situations, trends and new strategies to surprise viewers. For example, when a programme is a huge success in a local or foreign market, the same channels and others try to repeat the success by creating other similar programmes of the same genre. Concurrently, originality is a key aspect in retaining the interest of viewers (Ellis, 2000b).

3.2.4. Imported content in the local schedules

As previously stated, the basic aim of channels in a competitive context is to adapt and respond to the preferences and habits of the local viewers. Ellis considers that schedules are cultural forces which reflect the local societies: "the character of the national scheduling battle constituted a formidable site of resistance and resilience in the face of any globalising tendencies that might bear down upon it" (2000b, p. 36). Thus, according to this author, schedules have a local identity. However, Havens (2006) points out that this may only be true in the big markets and considers that in smaller countries, such as Hungary which he analyses, schedules are not only a reflection of the local routines but are also influenced by imported ideas.

The two countries studied in this analysis, Spain and the UK, are two major markets with schedules that are a clear reflection of the daily routines of the local societies. However, the television sector has increasingly become more transnational since the beginning of the 1990s (Chalaby, 2016b) and all local markets are influenced, to differing extents, by other local markets or transnational trends.

For example, the scheduling transition strategies were firstly used in the US market but they are now used in local markets with a high degree of competition, which is the case of most European countries (Esser, 2009a). Notwithstanding this, the US market is not immune to the influence of other local markets. For example, despite having a very low percentage of acquired programmes, a high number of foreign formats are being adapted.

However, transnational influences when introduced to the local market are altered (by indigenisation, hybridisation or glocalisation) and create a different cultural value than in its original context, whether they are finished programmes, formats or scheduling techniques. Thus, "any imported show is imported into this context of scheduling and its cultural identity is significantly altered as a result" (Ellis, 2000b, p. 36). Furthermore, acquired programmes are actively chosen by the cultural intermediaries and, in addition, they are introduced to local television flows which transform the meaning of that content. The acquisition and scheduling processes of imported content are key to understanding how foreign programmes are introduced into local markets.

In the following sections the role imported programmes have played over the years in the Spanish and British schedules will be firstly examined to historically contextualise the markets analysed in this dissertation by focusing on fiction, the most imported category (Havens, 2006) and which has gathered the most research. Later, the levels of European programmes in the schedules of the two countries will be compared.

3.2.4.1. Evolution of imported content in the Spanish market

Regarding Spain, there are rare studies that focus specifically on the presence of imported content in the television market. However, there are several research projects and reports which help to outline the evolution that imports have had on the general-interest channels.

Firstly, the papers published under the scope of the Image, Sound and Synthesis Research Group (GRISS) form a chronology of the schedules and trends of Spanish generalist broadcasters and the four other main European markets: Germany, France, Italy and the UK (Delgado & Prado, 2012; Prado, 1992, 1999, 2002, 2010; Prado & Delgado, 2010; Prado, Delgado, García Muñoz & Larrègola, 2005, 2009, 2011; Prado, Huertas & Perona, 1992).

Secondly, the Observatory of Television Fiction (Obitel) publishes yearly reports which analyse local Fictions in Ibero-America but also the presence of imported programmes from other Ibero-American countries. One of the chapters is aimed at the Spanish market, which helps outline the evolution of Latin-American programmes in Spain despite these imports not being significant in the current schedules (Lacalle, Castro & Sánchez, 2014, 2015, 2016).

Thirdly, the entity for the management of rights of audiovisual producers (EGEDA) published yearly industry reports from 2001 until 2012 on the Audiovisual Spanish audiovisual sector containing relevant data on imported Feature Films in the schedules of generalist channels. With these sources the presence of three different types of imported fiction in the Spanish schedules will be summarized: Serialised fiction, Feature Films and Latin-American content.

The first increase in imported Serialised fiction, mainly from the US, was with the dissolution of the public monopoly by the Act 19/1989 *of Commercial Television*[3]. The limited resources of the newly launched commercial free-to-air general-interest channels, Antena 3 and Telecinco (launched in 1990), restricted broadcasting of local fiction to the public channels while the commercials relied heavily on imported fiction, both Serialised and Non-Serialised.

Antena 3 was the first commercial channel to produce local Series in 1991 with *Farmacia de Guardia* (1991-1995), which was a ratings success. In comparison, Telecinco based its scheduling on international successful productions such as *Twin Peaks* (ABC, 1990-1991), *Beverly Hills, 90210* (FOX, 1990-2000) or *The X Files* (FOX, 1993-2002), all from the US. It was not until 1993 that the investment in local productions was considered profitable and *Truhanes* (Telecinco, 1993-1994) was premiered (Villagrasa, 2011). At the end of the 1990s, "the tendency to program domestic fiction increased, although fiction continues to be dominated by foreign purchases, mostly from the United States" (Moragas & Prado, 2000, p. 227).

[3] *Ley 19/1989 de Televisión Privada.*

The launch in 2005 of the two newest free-to-air general-interest channels, Cuatro and La Sexta (Act 10/2005 *of Urgent measures for the push of Digital Terrestrial Television*[4]), the liberalization of cable television and the encouragement of pluralism]), encouraged a reappearance of imported Series in the Spanish market, particularly in Prime Time. This initial hype was also stimulated because it coincided with the third golden era of the US television Series. Cuatro and La Sexta (2005), as Telecinco and Antena 3 had done previously, filled a significant amount of their schedules with these programmes and based their brand images on them in their initial years. For example, La Sexta had the catch phrase 'Serial lovers'.

Furthermore, at the same time US Serialised fiction also started to be scheduled on the new portfolio channels created with the implementation of DTT. In addition, pay-TV channels increased the value of these programmes in their schedules and the new VoD online platforms started to allocate imported Serialised fictions as the centre of their strategies. This has led to the current high availability of these programmes in the Spanish market.

The genre of Feature Films has occupied a significant role in Spanish schedules even in the public monopoly era (Moragas & Prado, 2000). While local Series have more appeal than imported, it is the opposite situation in the cinematographic genre and Spanish Feature Films hold a secondary role in the broadcast of this type of content. According to a report published by EGEDA, Spanish titles only represented 9.15% of Feature Films aired on television between 2009 and 2011, while 75% came from the US (*Panorama Audiovisual 2012*).

Concerning Latin American content, while nowadays these programmes have a secondary presence on Spanish channels, the presence of these programmes was significant between the late 1980s and the beginning of the 1990s. The first channel to introduce this content was the Catalan public channel TV3 with Brazilian Series such as *Escrava Isaura* (Rede Globo, 1976-1977) in 1984 and *Dancin' days* (Rede Globo, 1978-1979) in 1985. The state public corporation began to broadcast *telenovelas*, previously banned, in 1985 with *Los ricos también lloran* (ME, Canal de las Estrellas, 1979-1980) due to the increase in the hours of broadcasting (Chicharro, 2011). After the high levels

[4] *Ley 10/2005 de Medidas Urgentes para el impulso de la TDT, de la liberalización de la televisión por cable y del fomento del pluralismo.*

of success of these Series, Radio Televisión Española (RTVE) commenced airing a significant quantity of this genre both on the main channel La1, at that time known as TVE1, and La2, known as TVE2. These titles were initially scheduled in the morning slot but were soon reallocated to the midday and afternoon.

By far, the most successful *telenovela* was the Venezuelan *Cristal* (RCTV, 1985-1986). Initially broadcast on the second channel, it was moved to the main channel and the final episode was watched by more than eight million people (Chicharro, 2011). This success encouraged the newly established commercial channels to invest in these productions in their initial years. In 1990, eleven Latin American *telenovelas* were broadcast in the country and in 1992 this number increased to thirteen.

However, the saturation of this content in the Spanish schedules created boredom in the audience and on the whole these programmes have disappeared from the schedules. In contrast, the channels started to produce their own local Serials, slightly influenced by the *telenovelas* but also by the American and British soap operas, to broadcast in the afternoon slot. This period also coincides with the moment when the production of local fiction increased significantly.

Despite that Latin American programmes are currently hard to find in the Spanish schedules of generalist channels (in 2014 only one Brazilian Series was broadcast), some late successes can be found such as *Pasión de Gavilanes* (CO, Caracol Televisión/Telemundo, 2003-2004) (Lacalle et al., 2015).

3.2.4.2. Evolution of imported content in the British market

In contrast to Spain, many studies have deeply analysed the role of imported content in British schedules (Collins, 1986; Lealand, 1984; Rixon, 2003, 2006, 2007). These studies have focused specifically on the role US products have played in the country. Thus, this gives initial proof of the hegemonic role of US imports in the UK and the irrelevance of content from other markets throughout the years.

Across all the previous research, five moments can be distinguished which altered the role of acquired programmes in the schedules. First, the launch of commercial television in 1955; second, the success of the shows *Dallas* (CBS, US, 1978-1991) and *Dynasty* (ABC, US, 1981-1989) in the 1980s; third, the launch of Channel 4 and satellite and cable platforms; fourth, the appearance of Channel 5; and lastly, the proliferation of portfolio channels.

The first significant contact by British audiences to American television programmes was at the advent of commercial television. While during its public monopoly years the BBC had only broadcast a limited number of TV Movies and Series, ITV started to air a significant amount of American programmes in order to fill hours and attract audiences and advertisers (Segrave, 1998). The American Series were broadcast in Prime Time combined with domestic programmes to encourage the new production sector (Rixon, 2006). The long-running American shows helped the new UK broadcaster to create fixed points in the schedule.

The programmes acquired oversees were mainly American comedies, crime and western Series. This contrasted with the British content, especially with the programmes produced by the BBC, since they had a more serious and educational tone (Rixon, 2006). The audience were attracted to the less serious programmes presented by the ITV and soon the BBC started to increase its amount of American content (Segrave, 1998).

Despite the importance of American imports during the first years of ITV, Rixon (2006) highlights that most of the programmes were locally produced. Moreover, as soon as ITV was established, the level of imports in important slots decreased while continuing to be present in non-peak slots. Before the launch of ITV, concerns about the future increase in the amount of American programmes were made. Consequently, an agreement was reached between the six franchise companies of ITV and the Independent Television Authority (ITA) to maintain a 86:14 domestic to foreign quota. Despite the government deciding not to include this quota in the Television Act of 1954, it was maintained as a gentlemen's agreement (Sendall, 1982).

With the eradication of the limit of broadcasting hours in 1972, favouring the ITV companies since they had more time to sell advertising, the competition between the BBC and ITV started to increase. The 86:14 was maintained but American programmes started to be used again in Peak Time hours due to their popularity among viewers. According to Rixon (2006), inspired by Collins (1986), the most illustrative image of the role imports played for the two channels was the competition over the rights for *Dallas*, which was won by the BBC. This was also a clear example that British television had commercialized and internationalized (Rixon, 2006).

The third moment influencing the role of imported content in the country was the creation of Channel 4, which was launched to serve the interests of minorities. Its initial aim was to not air mainstream US programmes. According to Jeremy Isaacs, head of the channel from 1982 to 1987, "we are not going to buy American cops and robbers series. So I think we'll have fewer people killed a week on Channel 4 than on any other British channel" (cited in Lealand, 1984, p. 21). During these years, Channel 4 wanted to increase the level of programmes from other territories such as the Commonwealth, South America and the Third World (Lealand, 1984).

Initially, Channel 4 was not able to sell its own advertising, which was sold by the ITV franchises. Furthermore, imported contents were also acquired with the coordination of ITV. After the Peacock's committee (1986) Channel 4 was separated from ITV and, with a new head of the channel, it started to broadcast more populist programmes. American programmes such as *Cheers* (NBC, 1982-1993), *The Cosby Show* (NBC, 1984-1992) or *The Golden Girls* (NBC, 1985-1992) started to have success and the channel branded itself as the home of quality US programmes (Crisell, 2002; Rixon, 2006). Soon other shows that broadcast on Channel 4 were *ER* (NBC, 1994-2009), *Friends* (NBC, 1994-2004), *The Simpsons* (FOX, 1989-present), *Desperate Housewives* (ABC, 2004-2012) or *Lost* (ABC, 2004-2010). Furthermore, most of these shows were aired during Peak Time hours.

The first years of Channel 4 coincide with the beginning and establishment of satellite and cable platforms, especially Sky and BCB, which later merged to become BSkyB. Due to the restricted economic resources of these channels, they filled their schedules with American content (Rixon, 2003). As a consequence, during the 1980s and 1990s British viewers had access to a large amount of US programmes despite the small amounts on the two main general-interest channels. Notwithstanding the fear of the presence of American imported content, the greatest threat was the entering in the market of the non-British-based, non-regulated commercial broadcaster run by News Corp, an Australian multinational, British Sky Broadcasting Group (BSkyB) (Rixon, 2006).

The amount of US content increased again with the appearance of the last terrestrial general-interest channel, Channel 5, in 1997. This broadcaster was subjected to a considerably lower public service remit than the rest. During the initial years its schedule was described as "being fairly downmarket, relying on soft porn programmes, American imports and cheap quiz programmes" (Fanthome, 2003, p. 161). With the intention of upgrading the image of its schedule, local Documentaries were commissioned and US Series such as *CSI* (CBS, 2000-2015), *CSI Miami* (CBS, 2002-2012), *The Shield* (FX, 2002-2008) and *Law and Order* (NBC, 1990-2010) were acquired and broadcast in Prime Time.

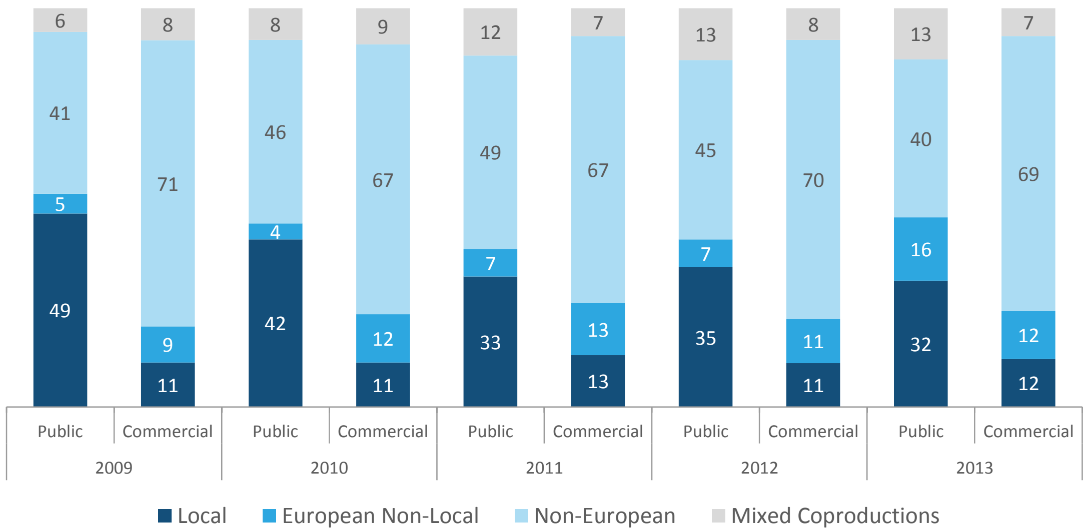
The digital context brought another situation for imports in the UK with the appearance of the portfolio channels of the general-interest broadcasters. During 2001 the Independent Television Commission (ITC), former ITA, pressured Channel 4 to lower its dependence on acquired programmes. While these were reduced from the main channel, the same year the company launched a new digital channel, E4, which relied heavily on imported content (Rixon, 2006). In the same manner, the BBC, ITV and Channel 5 started to launch their portfolio digital channels. As an important consideration, these new channels are not required to follow the public service objectives as the free-to-air general-interest channels are.

3.2.4.3. European programmes in Spanish and British schedules

According to data collected by the European Audiovisual Observatory (EAO) regarding the scheduling of fiction, Spain and the UK are located at opposite ends of the European average (Kevin & Ene, 2015). In the whole European sample, which includes ninety-six local channels in fourteen markets between 2009 and 2013, non-European fiction prevails with the 62% of the scheduling time dedicated to fiction. Regarding European productions, on average half is allocated to local content and around 45% are European non-local highlighting a positive sign of the circulation of European works. However, there is a major distinction between the schedules of public and commercial channels since, in general, public broadcasters fill their schedules with more than 50% of European local and non-local fiction but with the commercial channels this percentage drops to less than 20%.

Spain stands out for the low proportion of local fiction in the sample analysed by the EAO, situating the country at the lower end of the European scale. However, the sample reflects the situation between 2009 and 2013, years marked by the profound economic crisis in the country that directly affected the television market and produced a drop in the advertising income (Infoadex, 2014). The public channels have maintained their role as promoters of domestic productions over this period by scheduling a higher proportion than commercial channels (Chart 3). However, this has declined greatly by 10% in this period while the local productions of commercial channels have maintained their volume. The report also highlights that European (non-local) content usually belongs to programmes produced in Germany, France and the UK. Furthermore, the presence of non-European content is slightly higher than the European average.

Chart 3 - Origin of fiction on Spanish channels 2009-2013

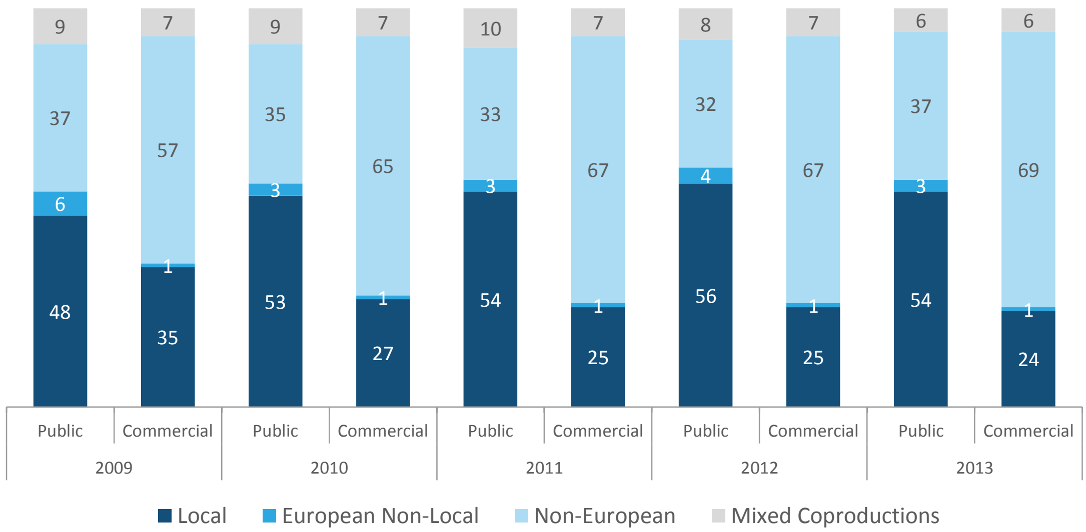


Source: Adapted from Kevin & Ene (2015)[5].

On the contrary, in the UK the presence of local Fiction is significantly higher than the European average highlighting the strength of their productions. In this case, commercial channels also have a high percentage of local productions in their schedules (Chart 4). However, the level of local fiction has decreased on public and commercial channels producing a general fall of 8 points in the five years of the sample. This has produced an increase in the presence of non-European fiction since imported European non-local programmes have a very weak presence of 2% from 2009 to 2013.

[5] Information based on 7 channels which in 2009 reached 51.5% of the market share according to EurodataTV.

Chart 4 - Origin of fiction on British channels 2009-2013



Source: Adapted from Kevin & Ene (2015)[6].

Thus, both countries stand out due to the low presence of European non-local content in their schedules. However, the UK has a higher percentage of local content while Spain is at the opposite end of the scale. This lower position of the Spanish market is more relevant since this market is one of the biggest in the European television industry. Non-European imports have maintained their percentage in Spain but have increased in the UK where in 2013 62% of the fiction was non-European, the same amount as the European average.

3.3. Video on Demand television

In the digital context, traditional broadcasters have to be present in different platforms in order to create a circular flow with their schedules and appeal to the viewers in all the screens they use for television consumption. Thus, these corporations have created different online platforms to not loose viewers to other new OTT services. Furthermore, they have adapted their linear schedule to on-demand consumption.

The AVMS Directive established that an on-demand audiovisual service is:

[6] Information based on 18 channels which in 2009 reached 66.7% of the market share according to EurodataTV.

> An audiovisual media service provided by a media service provider for the viewing of programmes at the moment chosen by the user and at his individual request on the basis of a catalogue of programmes selected by the media service provider (article1(g) AVMS Directive).

In addition, as seen before, the European directive limits the VoD platforms especially to those airing television like programmes. From a technical point of view, the International Telecommunication Union (ITU) defines an on-demand service as "a service in which the end-user can, on demand, select and view a video content and where the end-user can control the temporal order in which the video content is viewed (e.g. the ability to start the viewing, pause, fast forward, rewind, etc.)" (cited in EAO, 2009). This definition is much broader and is much less restrictive than the European legislation.

However, different services found in the market can be classified by different aspects. Following the classification established by the EAO (Grece, 2014) in the *On-demand Audiovisual Market in the European Union* report, on a general point of view we find:

- On-demand audiovisual media services according to the AVMS Directive:
    a. Catch-up TV
    b. Premium TV
    c. VoD
    d. Branded services on sharing platforms
- Other on-demand audiovisual services not falling within the definition of the AVMS Directive:
    a. Video sharing platforms (YouTube, Dailymotion, etc.)
    b. Social networks allowing video upload by users (Facebook, etc.)
    c. Video pages of newspapers websites
    d. Promotional websites with video content

Another important aspect to consider is the spatial impact of the services. When broadcasters air programmes on linear television, whether DTT, cable or satellite, the transmission is limited to a geographic area. However, the programmes of VoD services could be available worldwide although there are some geographical restrictions. According to the report from the EAO (2009), depending on these limitations we can distinguish three different services:

- Services accessible worldwide: the platform is open with no restrictions according to the geographical situation of the viewers. The most popular services of this kind are UGC platforms like YouTube or Dailymotion.
- Services accessible worldwide but with geolocation for specific content: whereas the platform is available from any part of the world, some content is restricted to certain territories, depending on the provider having the rights to that programme in particular regions. Catch-up TV services are usually in this category since their acquisitions are only acquired for their territory and some commissions are to be sold abroad.
- Services with geolocation: this is the category most often used for VoD services. Usually it works with the consumers IP address or, for some pay services, with the origin of the credit card as with iTunes Store.

We also have to consider the 'grey markets'. These markets are those where the service does not have the right to provide the service but for technological reasons since geolocation is not a perfect science, it is available.

Another important aspect of on-demand media services is the business model implemented. We can find six different models (Grece, 2014):

- TVoD: Transactional Video on Demand
- EST: Electronic Sell-Through (digital retail)
- SVoD: Subsription Video on Demand
- Pack VoD: services providing access, through a single transaction, to a limited number of films
- AVoD/FVoD: Advertising-supported Video on Demand/ Free Video on Demand
- TVVoD: Video on Demand on a digital TV platform

In addition, these services can lastly be classified by the service offered (Grece, 2014): generalist VoD, film VoD, TV fiction VoD, film and TV fiction VoD, short movies VoD, documentary VoD, children/animation VoD, music VoD, general-interest programme VoD, etc.

3.3.1. Differences between VoD and catch-up

The two most common categories in Europe are VoD (47%) and Catch-up TV (25%) (Fontaine & Schneeberger, 2015). From this point, the focus will be on these two types of services, both included in the spectrum of the AVMS Directive. First of all, a clear distinction between VoD and Catch-up has to be made. However, it is important to highlight that some platforms combine programmes on catch-up with others on VoD or other systems such as Premium.

The main and essential characteristic of catch-up is that all programmes were originally broadcast on linear television and are made available by the channel on an online platform for a limited period of time. Catch-up "is conceived as an extension of broadcast TV and therefore involves a strong element of time" (EAO, 2009, p. 220). Therefore, catch-up can only be offered by companies that have linear scheduling. In addition, programmes on catch-up are only offered for a limited period of time, which is why we there is a distinction between catch-up and archive. This latter option is being used by public television companies which are creating vast archives of their old programmes. For example, corporations like the BBC or the Australian ABC have made a large number of their old programmes available on their online platforms (Marshall, 2009).

In contrast, VoD programmes are directly shown online. These services are available on television screens as well as portable devices with an Internet connection, with no need to have a special decoder or set-top box as with IPTV platforms (Prado, 2015). The main transnational VoD players, in direct competition with traditional broadcasters, are services such as Netflix, Amazon Prime Video or Hulu.

This dissertation will focus on the online platforms of the sample broadcasters, and specifically on the strategy they follow with their catch-up services for imported productions. Furthermore, the ability to air content at the same time on different platforms such as linear scheduling and online streaming, that is to simulcast, will be analysed.

3.3.2. Broadcasters catch-up strategies

For channels, having an online presence and available content on their platforms is now a strategic imperative. "In 2006, led by Disney's ABC, all five major broadcast (and a handful of cable networks) moved in a new direction in online distribution by offering episodes of their current Series on their own Web sites" (Kompare, 2010, p. 81). This presence has several benefits for the broadcasters. The main advantage is the retention of the viewer by creating a second viewing window inside the same corporation. This helps to secure new viewers, especially young ones, and to maintain the prominence of broadcasters in the audiovisual landscape (EAO, 2009; Gripsrud, 2010). This new window enables broadcasters to exploit their programmes on another platform, which has additional revenues and reduces the cost of the programmes since they are being exploited in more windows (EAO, 2009).

For commissions and in-house productions, catch-up has become a standard for broadcasters. However, while the broadcaster usually owns the rights of exploitation in its territory for programmes commissioned by or for the channel (in the UK the super-indies producers retain the rights to exploit it worldwide (Chalaby, 2010)), the broadcaster does not directly have the rights to exploit the content online for the programmes that have been acquired in another market. The catch-up rights have to be implicitly included in the contract between the broadcaster and the distributor. Furthermore, the online rights are not always possible to acquire by the channel or they are too expensive to amortise.

While sometimes the competition for acquiring the online rights for imports is high, because VoD services and other players want them, broadcasters have advantages because of their prominence in the audiovisual market. Their consolidated brand image and their knowledge of the audiovisual industry including knowledge of the rights market, the knowledge of the audience and expertise with technical systems helps them to establish in the online market. The other advantage of broadcasters is their capacity investment, only surpassed by the telecommunications operators (EAO, 2009).

3.3.2.1. The start of catch-up television

While in 2006 some broadcasters had already started to make their episodes available online, the season 2007-2008 brought changes that reconfigured the television system. At that point, the industry had to react to the changes in the daily practices of viewers, the patterns of media consumption and the methods of revenue sharing between different actors of the industry (Curtin, 2009). These changes first occurred in the US market but soon were extended to other countries, including those in Western Europe.

At the beginning of that season the fundamentals of audience measuring in the US changed profoundly after pressure from the broadcasters and also advertisers. The decrease in live viewers and the increasing use of DVRs made networks press to include some of these new viewers in the audience results. Specifically, those viewers watching the programme within three days of its original airing. However, advertisers also pushed to have TV commercials ratings as well as programme ratings. These two changes transformed the traditional method of measuring.

The second challenge of the season was the drop in audiences due to the increasing use of other types of media in their free time, especially videogames. The launch of the title *Super Smash Bros Brawl* on March 9, 2008 brought an 8% fall in the 18 to 24 male audiences that day, and a 13% drop the following day (Curtin, 2009). Time spent online also affected television viewing, especially among young viewers.

Finally, the writers' strike starting at the end of 2007 profoundly affected the US television industry. The strikers were demanding a new way to share the revenues of the new distribution systems. All these changes obliged the television industry to rethink the business model of their companies and their position in the digital spectrum and resulted in the standardisation of catch-up television for US networks.

In Spain, the first corporation to start uploading content to its website was the regional *Corporació Catalana de Mitjans Audiovisuals* (CCMA) from Catalonia. In December 2004 they inaugurated the service '3alacarta' that had a programme catalogue of 300 videos. Francesc Escribano, director of the channel between 2004 and 2008, commented on the main reasons to create the platform: "This is a great economic investment but we believe that it is a public service that also allows us to connect with a younger audience, that was fleeing from conventional television"(cited in Gómez, 2007).

At the Spanish level, Antena 3 was the first generalist channel to offer television on-demand. Its first efforts were focused on local Serialised fiction. In May 2007 the channel made available all of the episodes of the local Series *Círculo Rojo* (2007), *El internado* (2007-2010) and *Los hombres de Paco* (2005-2010) to Internet users for free. These Series were being broadcast in the linear schedule and were available on catch-up the day after its premiere (UTECA, 2008). The public state corporation, RTVE, also started its catch-up service in 2007. The chapters of *Heredores* (La1, 2007-2009) and *Desaparecida* (La1, 2007-2008) could be seen on their website after being shown on television (UTECA, 2008).

In January 2008 Antena 3 premiered the first chapter of the fifth season of *Los hombres de Paco* (2005-2010) online, becoming the first European television channel to premiere a chapter of a local Fiction Series on its online platform rather than the linear schedule. The initiative was supported by followers of the Series reaching a million online visits. Subsequently, other Fiction Series from the channel used the same strategy as, for example, *Física o Química* (2008-2011) releasing several chapters on the Internet and through the mobile devices of the telecommunications company Vodafone (UTECA, 2008).

The new business director of Antena 3 in 2007, Giorgio Sbampto commented that "it's not about putting up video clips of 30 seconds, but whole chapters, an hour or eighty minutes" (cited in Gómez, 2007). Before uploading entire chapters, channels created their own channel on YouTube, where the highlights of each programme were uploaded. In 2008, Antena 3 had already exceeded 35 million views.

The UK has been one of the fastest markets both in Europe and worldwide to develop VoD and catch-up TV right from the beginning of online television. The BBC launched an experimental catch-up service, iPlayer, as early as October 2005 but it did not officially start until December 25, 2007. Initially, the platform allowed the download of the programmes aired in the linear schedule for the following seven days with some technological limitations (EAO, 2009; P. Smith & Steemers, 2007). The service was an immediate success: between December 2007 and March 2009 the platform had more than 360 million visitors (BBC, 2009, p. 31).

However, the launch of iPlayer was subjected to fierce political debate regarding its funding. Before launch, Ofcom thoroughly evaluated the service and the BBC Trust undertook the first 'Public Value Test'[7], which finally approved the proposal from the BBC on April 25, 2007. The funding of the service through broadcasting license fee was an issue, as on-demand television was not considered to be part of broadcasting.

[7] A mechanism to value public service against market impact.

Nevertheless, the BBC was able to proceed with its service with only minor modifications (EAO, 2009; Humphreys, 2009).

The role of the BBC as leading the change from linear television to multiplatform media is notable and still remains the most popular on-demand service in its market. In 2012, 32% of British adults used the service (Ofcom, 2015d). Furthermore, iPlayer is still leading innovation by investing for programmes specifically for VoD. For instance, on January 1, 2016 BBC Three become an online only channel. In Europe, according to the EAO (Fontaine & Schneeberger, 2015), the only other broadcaster producing original content for its online service is the French channel Canal+ with its platform CanalPlay which is a SVoD.

According to the EAO, the first broadcaster in the UK, and in the world, to create an on-demand service was Channel 4, which launched its VoD service as early as 2006 called 4oD, now All4. The service started as a mixture between pay-VoD and free catch-up funded by advertising. Catch-up programmes were available for the following 30 days after being aired. In 2008, 133 million programmes were downloaded from the Channel 4 website, which was an increase of 72% over the previous year (EAO, 2009). The active role played by this corporation is partly explained by their specific public remit of being innovative. Furthermore, Ofcom encourages the availability of their programmes on several platforms (Ofcom, 2013a).

The other two British free-to-air generalist channels started to upload their programmes available online in the following years. ITV launched its catch-up platform in June 2007, which was renamed to ITV Player at the end of 2008 and it is currently known as ITV Hub. Channel 5 started its catch-up service, Five Download, in 2008 offered programmes previously aired on the linear channels for the following 30 days via streaming or download. The service was free to access, however, some of the programmes, including imported titles such as *CSI* (CBS, 2000-2015) and *Grey's Anatomy* (ABC, 2005-present) were available for rent at a cost of 0.99 pounds. Some other programmes were also accessible to watch online before their linear transmission at a price of 1.99 pounds (EAO, 2009). The service is currently known as My5.

3.4. Partial conclusions: The circular flows of traditional broadcasters

All the developments that have occurred in the television market have broadened the scope of the medium deeply affecting the role of schedules in the current era. VoD services are challenging the classic scheduling strategies based on linear flows used by the channels, creating a higher level of individualization of the consumption and implementing self-constructed schedules. However, “as often as we are promised the convenience of the television experience ‘anytime, anywhere’, we are equally invited to participate in communities, share television moments, watch live now, come home to television, and structure our daily lives around TV” (Bennett, 2011, p. 5).

Channels are including online exhibition windows in their strategies. This has created multi-media corporations that do not only create a linear schedule but also a circular flow to bring linear viewers to their online platforms while bringing on-demand users to their linear broadcasting. These objectives are also part of their scheduling strategies, considering scheduling as a unit of meaning formed by television programmes to generate a brand image for the channel to appeal to viewers.

At the same time, traditional broadcasters are using the new possibilities to highlight the value of their programmes and engage users, especially young ones, to watch their linear schedules while they comment on their programmes online leading to the revival of live television (Jenner, 2016; Sørensen, 2016). Thus, linear schedules are still a key asset for broadcasters and play an important role in the audiovisual viewing habits of individuals since linear television is still the most consumed window.

The online strategy of channels also aims to compete with the new VoD platforms. Some of these services are already major transnational agents in the television market such as Netflix, Amazon Prime Video or Hulu. While these companies do not have linear schedules, their catalogues and their recommendation and promotion of their programmes can be compared with the scheduling strategies of traditional broadcasters. At a time when there is more content available than ever before, recommendations and promotional techniques are at the centre of the strategies of all content aggregators.

4. EUROPEAN AND LOCAL CONTENT QUOTAS

All economic activity requires a minimum framework to function. However, the markets related to information and communication cannot only be ruled by economic interests since they trade with cultural goods. As a consequence, media legislation has been passed to create a legal structure for audiovisual activities. In general terms, the evolution of these norms directly affects the activity of broadcasters and also VoD services. In addition, it also specifically conditions the Scheduling and Acquisitions Processes.

Van Cuilenberg and McQuail (2003) distinguish three different phases in the evolution of media policies in Western Europe and the US. The first period was from the beginning of the communication industry (not only broadcasting) up to the Second World War. The second period continues from after the war until the 1980s and 1990s. In this phase "media policy was dominated by socio-political rather than economic or national strategic concerns" (van Cuilenburg & McQuail, 2003, p. 181). In Western Europe especially, these concerns were captured by the public services. Lastly, the third phase, the new communications policy paradigm, which has also been called 'deregulation' (Moragas & Prado, 2000), started with the breaking up of the public monopolies across Europe and is still ongoing. Authors published these considerations in 2003 but the same characteristics are still happening. This phase is shaped by technological, economic and social changes simultaneously influencing media policies. We consider that these three factors are still conditioning media policies, despite all the changes and advances.

Two levels of media policy will be analysed in the following sections, European and local, both focusing on the measures regarding content and specifically those affecting imported programmes. The entire sample of this study is still under the scope of European legislation despite the imminent exit of the UK from the EU.

4.1. The European television single market

The EU has competition laws to secure the correct functioning of markets and to prevent anti-competitive situations within economic sectors. These laws, mostly included in the Treaty on the Functioning of the European Union (2012 is the latest consolidated version to the present), set rules to prevent monopolistic situations, market dominance and establish conditions for mergers and aid from the states to specific sectors. However, these minimums are not considered to be enough for the broadcasting sector since non-economic measures are needed to regulate and secure the social and cultural functions of television. Thus, television laws are in line not only with economic factors but also with cultural and social issues. This distinction distances the EU from the US regarding audiovisual industries and this is highlighted with the term used in both cases to refer to these industries: in Europe they are known as cultural or creative and in the US as entertainment industries (Corredor & Bustamante, 2012; Doyle, 2012; Garnham, 2011; Zallo, 2007).

While other mass media such as press or telecommunications have traditionally had low levels of state intervention, television has been highly regulated in European countries since the beginning of broadcasting. The great influence that television was thought to have over societies made the states want to have a high degree of control over it. As a consequence, European television markets were created with a very different model to most parts of the world such as North and South America. This tendency has been paralleled by European legislation since it is the only media that has been of concern to the EU. As an example, the latest AVMS Directive (2010) has broadened the scope of legislation to non-linear platforms but only when they have television-like content.

Before the EU started to take interest in the television industry, the sovereignty of broadcasting was entirely under the jurisdiction of the states and, in some cases, also regional governments (as in Germany and Spain). Since then, two European directives regarding the audiovisual industries and a range of projects to support them have been implemented. However, since it is not only an economic issue, Member States still have the main power of legislation on this topic. Nevertheless, regulation at European level greatly influencing the laws implemented by each Member State.

Originally, the intervention of the EU on media was contested due to the jurisdiction falling under permit of the states. The EU, the European Community at that time, argued three different reasons why transnational legislation had to be implemented: the economic argument, the cultural argument and the legal argument (Donders, Pauwels, & Loisen, 2014). In terms of economics, the audiovisual sector had indications from the beginning of the 1980s that significant growth was possible. The institution suggested that since the European market was very fragmented, not all economic possibilities were being exploited. Furthermore, the Commission pointed out that strength was needed to directly compete with two external rivals: the US and Japan in both economic and cultural terms (Collins, 1994).

The cultural argument was outlined in a pragmatic manner stating that for culture, the benefits of intervention were greater than the disadvantages alerting that if there was no intervention, the presence of large quantities of US content would damage European cultures. In addition, intervention would facilitate the creation of pan-European channels (Pauwels, 2014). Notwithstanding, the EU did not originally have any control of cultural and social aspects. It was not until 1992 that the EU gained some jurisdiction over culture (Article 167 of the Treaty of the European Union). Specifically, the EU achieved control of the promotion of cultural diversity, however, the Lisbon Treaty of 2007 made clear that the scope the EU had was of support for culture and that it did not have the power to create binding legislation to homogenise the legal framework of Member States in this aspect (Michalis, 2009, 2014).

Lastly, a legal argument had to be advanced in order to justify the intervention into broadcasting by the European Community. If the European audiovisual industry had to be stimulated and all European cultures had to be protected, the European Community was the organ responsible for it. According to this argument, it also had the responsibility to set a shared minimum legal framework across countries.

The Television Without Frontiers (TWF) Directive (1989) and the updated Audiovisual Media Services (AVMS) Directive (2007 and 2010) are the main actions of the EU regarding broadcasting. These directives were written in collaboration with the Member States since to have a real effect on the local legislation framework of each country, these directives have to be transposed into their own legal systems. As previously commented, the EU does not have the authority to issue laws directly on this topic.

In the following section the approaches of the directives and their effects on the European television markets will be discussed. Nonetheles, these are not the only actions the EU has taken to protect and support the audiovisual industries. Another significant project established by the EU is the MEDIA programme (multi-annual programmes) to develop, promote and distribute European audiovisual pieces. Also, the EU has acted as the spokesperson to defend European interests in media at an international level (for example, at the World Trade Organization and at UNESCO discussions). The main purpose when the EU defends European media is to ensure that audiovisual works fall under the category of 'cultural exception' (Pauwels, 2014).

Furthermore, all Member-States have to support the protection of freedom of expression, which is signed into the United Nations Charter and the European Convention on Human Rights. Additionally, they have to embrace cultural diversity as accorded in the UNESCO Convention on the Protection and Promotion of the Diversity of Cultural Expressions.

4.1.1. The Television Without Frontiers Directive

In 1984 the European Commission generated the *Green Paper on the Establishment of a Common Market in Broadcasting, Especially by Satellite and Cable*. This paper highlighted the necessity of having shared legislation through Member States on certain aspects of broadcasting including advertising, protection of minors and the convenience of a single television market across European states. In this last aspect, there was also a desire to promote transnational television services across the continent.

These ideas were the basis for the edition of the TWF Directive (89/552/EEC) five years later which its principle measure was the creation of a unique television market across all Member States. Also, the directive wanted to protect certain public interest objectives, with cultural diversity being one of them. The right to reply and minors and consumers protections were also the other main objectives of the directive.

The establishment of a single market across Member States assisted in the eradication of borders between EU members. This measure falls under the category of negative intervention legislation since it erases borders and diminishes the power and sovereignty of states to facilitate the trade of television and audiovisual programmes. The main idea behind this measure was to create a market situation similar to that in the US. Having a large, effective audiovisual market would open up the possibilities of exploiting economies of scale and scope. This reason is highly economic and is one main reason why the directive has been considered on several occasions as having a focus on economic factors and a neoliberal approach. Another sign of the importance of the economic perspective is that trade ministers, not cultural, signed the directive (Nowak, 2014).

The eradication of borders was not the only logic behind the single market measure. It was also intended to stimulate television flows between Member States and to fill European schedules with European works, not Americans. The directive was approved in a decade when commercial channels were still in their early years throughout Europe and were highly dependent on imports, mainly from the US. This arose fears of media imperialism in Europe from the US (Herman & McChesney, 1997; Schiller, 1991).

Another major topic of the directive was culture and identity with two simultaneous objectives. Firstly, European cultural diversity was to be preserved by the broadcasting system since the US imports were thought to jeopardize it. Secondly, a common European culture was desired to be shared by all the different societies of Europe. Thus, a process of Europeanisation was wanted.

4.1.1.1. The European works quota

These cultural objectives were also supported by the implementation of a content quota for European works. Quotas are one of the most used content regulation measures when protecting local audiovisual industries against the influences of other transnational players. This quota established that broadcasters should reserve the majority of their time to European works. Article 6(5) of the TWF Directive determined that European works are:

> (i) works originating in Member States;
>
> (ii) works originating in European third States party to the European Convention on Transfrontier Television of the Council of Europe and fulfilling the conditions of paragraph 3;
>
> (iii) works co-produced within the framework of agreements related to the audiovisual sector concluded between the Union and third countries and fulfilling the conditions defined in each of those agreements.

This measure was one of the most controversial of the directive and was fought by the UK and Germany, with the first arguing that this measure went against free trade. For Germany the problem was that it took sovereignty from the *Länder*. Furthermore, the US, the main exporter to European schedules, severely criticised the quota and accused it of being 'protectionist' (Doyle, 2002).

As a consequence of the fierce opposition, the quota was finally greatly reduced in power. Firstly, not all types of content were affected by it. News, sports events, advertising, teletext and teleshopping services were excluded (Article 4). Secondly, Article 5 stated that the quota only had to be fulfilled when it was possible and in a progressive manner (neither the quota nor directive are legally binding). The possibility to fulfil the quota progressively was added particularly for new channels since in the initial phases it is not always possible to reserve this percentage to European works. Due to budget restrictions cheap, imported programmes are usually used instead.

Another limitation of the European works quota is that it does not limit when the European programmes should be broadcast. Thus, the requirement can be accomplished by airing programmes in Prime Time as well as in the middle of the night. Also, it does not specify if these programmes should be old or new (reruns count as much as first runs) or if should be local or from other European countries.

To be effective, the TWF Directive had to be transposed to each Member State's legislative framework. This enables states to adapt the measures to their particularities. For example, the EU enables Member States to establish local quotas for regional media productions or regional languages. In the case of Spain, the European quota was further restricted to specify that half of the European works demanded had to be produced in one of the four official languages of the country (Spanish, Catalan, Basque or Galician).

The directive also contemplated another content regulation: a quota for independent works. It was suggested that at least 10% of the scheduling time (excluding the same programmes as the previous quota) should be dedicated to content produced by independent producers. There is a difference worth mentioning between these two quotas. While the European works is a broadcasting quota and is based on air time, the Independent quota considers both broadcasting time and production investments (Katsirea, 2014).

The latter quota has been interpreted differently in the various Member States. While in some countries only public broadcasters have to follow this obligation, other Member States have extended this quota to all broadcasters (Lange, 2014). In this second case we can find Spain and the UK, but only for free-to-air channels.

4.1.2. The Audiovisual Media Service Directive

Technological advances made it necessary to update the TWF Directive. “Content can now be transmitted over various networks that previously were subjected to a separate regime of laws” (Iosifidis, 2014, p. 10). Despite being partly updated in 1997, changes had to be more deep-rooted to reflect the new levels of convergence in the audiovisual market. In 2007 the AVMS Directive was approved. However, the AVMS Directive of 2007 is just an addition of certain aspects (especially concerning the VoD services) to the TWF Directive of 1989 (89/552/EEC). In 2010 a completely new directive was published with new coding that unified the 1989 directive and all the reforms subsequently made.

The main new change was the scope of the directive. While the TWF was a clear piece of sectorial legislation, the AVMS expanded the scope to non-linear services that were broadcast by technologies other than terrestrial, cable and satellite, distinguishing between media services that are broadcasters and on-demand media services. Nevertheless, it still is slightly sectorial since cinema screenings, for example, are excluded. The other relevant changes were the flexibility of some advertising rules and the allowance of product placement in certain programmes.

The enlargement of the scope of the directive was not promoted by all parties. Commercial channels, publishers, telecommunication companies and online-only services were contrary to the regulation of the online audiovisual sector. The UK was also strongly against it. According to these opponents, restrictions on online media services would jeopardise European competitiveness against global players and would diminish innovation (Michalis, 2014).

Another new aspect of the AVMS Directive was the encouragement of the positive measure of the legitimisation of local regulation authorities. This allows the states to maintain (and recover) some of their jurisdiction (Nowak, 2014).

4.1.2.1. Different rules for linear and non-linear television

In the AVMS Directive, the intrinsic characteristics of the on-demand media services are used to justify the lower levels of regulation required in contrast to traditional broadcasters. Regarding content regulation, while the European works and Independent quota were maintained for traditional broadcasting services, the quotas had to be adapted and re-formulated for the non-linear services context. On linear television the quota refers to the programming time, on the non-linear platforms no minimum requirement was established and only more general concepts were set to promote European works (AVMS, 2010: article 69).

This creates surprising differences between similar online services depending on if they are owned by a broadcaster or if they operate solely online (Doyle, 2012). For example, catch-up services by the broadcasters have to follow the same rules as linear television since it is offering the same programmes as linear television by the same media service provider. In contrast, VoD services, operating with non-linearity, only have to follow the rules for on-demand media services (article 27, 2010). To justify the exception of these services in fulfiling the quota for European Works, the active role of viewers in on-line services is used:

> The choice and control the user can exercise, and with regard to the impact they have on society. This justifies imposing lighter regulation on on-demand audiovisual media services, which should comply only with the basic rules provided for in this Directive (Article 58 AVMS Directive).

The actions that the directive suggests to embrace European productions on on-demand audiovisual services are the financial investments in the production or acquisition of content; a minimum level in their catalogues; and to present European Works in a visible and appealing manner (Article 69 AVMS Directive). However, at the present time these are only suggestions whith no concrete quota or measure for them to fulfil. A possible future quota for European works for on-demand services at 20% has been announced. However, the mere presence of European content does not guarantee an equal access to these programmes if they are not presented in an appealing manner (Katsarova, 2016).

4.1.3. Repercussions of the measures of the directives

While the TWF and AVMS Directive had clear objectives, the non-binding character has affected the results of its aims and its measures have to be critically analysed. First of all, the elimination of borders for audiovisual products does not directly enable the creation of a single and uniform European television market since the majority of sovereignty is still under state control. Furthermore, the specific socio-demographic factors of each member state create significantly different local television markets. The three characteristics that highly influence each market are the size of the state (bigger markets are more self-sufficient), the GPD of the country, which influences the level of equipment that households have, and the average individual viewing time (Lange, 2014). Furthermore, the cultural and language diversity within European countries causes difficulties in the creation of a unified single market.

Notwithstanding, this negative regulation measure did have an impact on local markets mostly benefiting the biggest countries of the EU. The characteristics of cultural goods and their costs structure benefits the application of economies of scale and scope directly benefiting the biggest players. The higher the production capacity, the greater the ability to sell content on the international market at a minimal cost increasing profitability (Collins, 2014).

> From a neoliberal approach to media policies, negative integration is more desirable than positive integration because the removal of economic barriers between countries creates big markets and leaves their development to market powers – under minimum regulation. This favours big media companies in particular (Nowak, 2014, p. 108).

Thus, not only do larger countries benefit but also large, multi-national companies like Endemol, which even though it is established in the Netherlands is now present in other European countries. "There has never been a single European media system and pan-European media exist on the supply side" (Michalis, 2014, p. 142).

Collins (2014) adds that the consequences of the unification of the European audiovisual market also prevent audiences from smaller EU countries having access to other international content, which diminishes diversity. Furthermore, Schlesinger (2001) also questions why cultural identities in Europe are affected more by US productions than by European.

The quota for European Works had high expectations and many objectives were sought with its implementation. Even though the quota requirements are fulfilled (Lange, 2014), there is no reason to directly link the majority of European programmes in the schedules to this requirement by the EU. As previously mentioned, audiences prefer content that they can feel a sense of proximity to and can easily identify with. Consequently, when European commercial channels were economically established in their local markets, during the 1990s in most states, they started to produce local content and to depend less on US imports (Prado, 1999). Commercial channels saw that local products provided higher ratings and stronger brands than imported content. Therefore, the forces of the market itself entailed the increase in European works, which, chronologically, coincides with the years after the establishment of the TWF Directive.

Another reason to question the effectiveness of the European quota is the low level of exchanges between European countries. As previously stated, one of the main objectives of this measure was to encourage cultural exchanges across Member States. Despite the accomplishment of the quota by most broadcasters, it is being fulfilled by local content and not European non-local productions with the only exception being public channels (Lange, 2014). The inner trade has not significantly increased and content from other European countries is still rare in the schedules of Member States implying no Europeanisation (Esser, 2009b). Most likely as an observation of this fact, the new directive implies that "Member States should encourage broadcasters to include an adequate share of co-produced European works or of European works of non-domestic origin" (Article 70 AVMS Directive).

In the following sections, the legislative frameworks of Spain and the UK will be discussed. Firstly, a brief summary of the development of the regulation of the sector will be introduced focusing on the latest changes that directly affect both markets. Secondly, an in depth analysis of the content regulations will be presented focusing on the quotas for domestic and European works and the promotion of culture and diversity.

As an initial context, it has to be mentioned that both markets are completely digitalized. In the UK, the digital switchover was in 2012 while in Spain in 2010. However, before the definitive implementation of DTT both markets failed in their first attempts to introduce this technology into their countries. The first platform launched in the UK was On Digital in 1990 (changed to ITV digital three years later) and was controlled by Carlton and Granada Groups (Sabés Turmo, 2006). In 2002 it collapsed which brought the need for new DTT legislation and the free platform Freeview was created with the BBC in the leading role. It was also headed by the company Crown Castle and included BSKyB. The government was concerned that if there was not a rapid response, BSKyB would take advantage so Freeview was launched in October 2002 and by 2004 it was already a success (Smith & Steemers, 2007). The digital switchover was completed on October 24, 2012.

In Spain, the first DTT initiative was also a payment platform called QuieroTV, which was launched in October 1999 with fourteen channels. The initiative was a failure because only 18% of households had access to digital television. Moreover, the content offered by the platform was very similar to the one offered by the satellite platforms, which were already consolidated in the Spanish market. It ceased broadcasting in 2002 with only 120.000 subscribers and losses of 320 million euros.

The Spanish government took three years before launching DTT again (Act 10/2005 *of Urgent Measures for the Push of the DTT, the Liberalization of Cable Television and the Encouragement of Pluralism*[8]). On November 30, 2005, eighteen free-to-air channels began to broadcast in digital (Leon, 2007).

In 2007 the Spanish government approved the definitive dates for the analogue switchover, which was two years in advance of initially planned coinciding with the limit authorised by the European Union: 2012. By the April 3, 2010 only digital channels were broadcasting.

4.2. Spanish local content quotas

According to the much-cited classification of media systems anchored by Hallin and Mancini (2004), Spain belongs to the polarised pluralist model, also called the Mediterranean model. One of its main characteristics is the political parallelism, that is to say, the strong relationship between the political system and the media resulting in the politicisation of the media. This parallelism is mostly visible in the newspaper sector although television is also influenced by it. Another characteristic is the strong role of the state in the media sector. As an example, directors of public media corporations are currently appointed due to their political ideologies rather than their professional experience enabled by the Act 17/2006[9].

This strong presence of the state in the media has introduced a broad range of legislation over the years that has created confusion and an unstable market. The large number of laws is due to different legislation applied to media according to geographic scope, the type of ownership, either public or private, or the method of transmission of the signal. "A plethora of rules that ends up leading to situations as curious as the same television programming, depending on the infrastructure through which the viewer

[8] *Ley 10/2005 de Medidas Urgentes para el Impulso de la TDT, de la Liberalización de la Televisión por Cable y del Fomento del Pluralismo.*
[9] *Ley 17/2006 de la Radio y la Televisión de Titularidad Estatal.*

receives broadcasts can be classified as public service or not" (García Castillejo, 2014, p. 11). Furthermore, the level of politicisation of the media has caused frequent changes to broadcasting laws whenever there is a change in the government.

At the beginning of the 2000s it was clear that all these laws had to be grouped together and that the Spanish legislation framework, as happened at the European level, had to be rethought due to high levels of convergence and new technological possibilities. This change started in 2004 with the arrival in government of the Spanish Socialist Party (PSOE) who aimed to update and reorganise the media legislative system, including private and public broadcasters.

The following year they passed the Act 10/2005 of *Urgent measures for the push of DTT, the liberalization of cable television and the encouragement of pluralism*[10], which updated the previous law on commercial television (Act 19/1988). Within this measure, the Spanish free-to-air television system was expanded with the licensing of a new free-to-air generalist channel to the Compañía de Inversiones Audiovisuales La Sexta, which started to broadcast under the commercial name of La Sexta. Additionally, another free-to-air license was supplied to the pay platform Canal+ (Sogecable), which launched Cuatro. These channels started broadcasting on analogue and digital terrestrial television simultaneously. The relaunch of DTT also enabled the creation of thematic free-to-air digital channels (UTECA, 2008).

While in 2005 plurality was encouraged, the economic crises forced the same socialist government to approve in 2009 the Act 7/2009 *of Urgent Measures in Telecommunications*[11], which allowed the merger between different media groups to guarantee their financial security so that they could implement necessary investments. This law established a barrier to enterprise concentration by placing "limits on the simultaneous ownership of shares in the capital of different operators setting the barrier of 27% of average audience of operators in which the holder of simultaneous shares has more than 5% of capital" (Preface Act 7/2009). This measure has resulted in the polarisation of the Spanish television market into three main players: the public corporations and two large commercial conglomerates that have two general-interest

[10] *Ley 10/2005 de Medidas Urgentes para el impulse de la TDT, de la liberalización de la televisión por cable y del fomento del pluralismo.*
[11] *Ley 7/2009 de Medidas Urgentes en Materia de Telecomunicaciones.*

channels and a large number of portfolio channels, aside from other assets such as radio stations (Bustamante, 2013).

Telecinco was the first broadcaster to consolidate with Cuatro, one of the new stations created in 2005. The merger was completed at the end of 2010, which enlarged the media company Mediaset España. At the same time, after months of discussions and different obstacles from the competition trustees, Antena 3 sealed the merger with La Sexta in October 2012 leaving the market completely polarised. This merger created Grupo Antena 3, which on March 6, 2013 changed its name to Atresmedia.

In 2010 the General Law of Audiovisual Communication[12] (LGCA, Act 7/2010) was finally approved after four years working on the draft, which replaced eighteen previous laws and regulations covering the entire basis for media legislation. In the preamble to the law, the reasons for the necessity of a new communications act are established: the enlargement of the audiovisual sector and its increasing economic significance, new technological advances, competition from the Internet and the evolution of the business models. Furthermore, this act also transposed the European AVMS Directive to the Spanish legislation framework, which expanded the scope of the law. The new services included in the Spanish law are classified in two different categories:

> - Audiovisual communication services on-demand, "it lends itself to the viewing of programmes and content at the time chosen by the user and his individual request on the basis of a catalogue of programmes selected by the media service provider"
>
> - Television in mobility, "it lends itself to the viewing of programmes and content on a mobile device" (Article 2.2b LGCA).

While not defining if mobile television is on-demand or has a schedule, the category that is most interesting is the first since it includes all VoD services. However, the terminology is not clear across the LGCA.

This act also introduced the creation of an independent regulator for the audiovisual sector, the State Council for Audiovisual Media[13] (CEMA) (Article 44), with the encouragement of the directive. Its areas of responsibility are stipulated as verification, inspection, control and penalisation of all audiovisual services. However, it does not have the legal capacity to control the public remit of the public services.

[12] *Ley 7/2010 General de la Comunicación Audiovisual.*
[13] *Consejo Estatal de Medios Audiovisuales.*

Despite the obligation by the 7/2010 Act of the establishment of CEMA, this organ was never active. The change in the government at the end of 2011 paralysed the creation of the independent regulator. The new government, currently ruled by the right wing party *Partido Popular,* altered the CEMA sectorial structure and delegated its responsibilities to a multisectorial regulator, the National Commission of the Markets and Competition[14] (CNMC). This authority has responsibilities in others sectors such as energy, electronic communications, railway transports, airports and ports infrastructures and the postal services.

The characteristics of the audiovisual sector, which is conditioned by economic and cultural factors, can not be engaged well by an economic multisectorial regulator (Malaret i Garcia & Timón, 2014). Despite the CNMC also having the obligations of content regulation (attributed by Article 9 of the Act 3/2013, *creation of the CNMC*[15]), the members of the CNMC are not all specialists on the audiovisual sector. Furthermore, the independent regulator of the Spanish audiovisual sector goes against the European tendency to establish sectorial independent regulators such as the Ofcom in the UK or the *Counseil Supérieur de l'Audiovisuel* in France created as early as 1984.

4.2.1. Public service remit in the Spanish market

While we have commented primarily on the economics, technology and the distribution of the limited air space (licenses, mergers, digitalisation, etc.), now the focus will be on the cultural and social aspects of the Spanish legislation framework. In Spain, media legislation is based on the main principle anchored by Article 20 of the Spanish Constitution of 1978, referring to the fundamental rights and public freedom. This article settles the recognition of the right to "freely communicate or receive truthful information by any distribution platform".

The protection of cultural and linguistic diversity is administered by two different points: as a right of the public and as an obligation on the service providers. Article 5 of the LGCA specifies the right that the public has to access an audiovisual system that includes the cultural and linguistic diversity within the Spanish society. Concurrently, Article 4.4 states that audiovisual services will promote the knowledge and diffusion of

[14] *Comisión Nacional de los Mercados y la Competencia.*
[15] *Ley 3/2013 de la creación de Comisión Nacional de los Mercados y la Competencia.*

the official languages of the state (Spanish, Catalan, Basque and Galician) and their cultural expressions. An emphasis is put on the role of public services in this responsibility.

Since the approval of the LGCA, 'public services' only include those corporations owned by the state or other public institutions such as the autonomous communities. Before 2010, all free-to-air channels were considered public service since commercial channels operated with an administrative concession. This concept of public service was modified by the LGCA, which established all audiovisual communication services in radio, television, connected and interactive as 'general-interest services' narrowing their public service remit:

> They are enlisted for the exercise of the right of freedom of expression of ideas, the right to communicate and receive information, the right to participate in the political and social life and the right of freedom of company and in the promotion of equality, plurality and democratic values (Article 22(1) LGCA).

With this revision, commercial channels now operate through a license, not under an administrative concession, and the frequency of renewal has reduced from ten to fifteen years. Furthermore, this renewal is now an automatic process (except for some small exceptions outlined in Article 28.2).

The schedules are utilised to justify the differentiation between general-interest service and public service. Since the Amsterdam Treaty granted all the competency to define what is considered to be public service scheduling to the states governments, the LGCA defines that public services have to offer "diverse and balanced schedules for all audiences, covering all genres, aiming to meet the needs of information, culture, education and entertainment of society and to preserve media pluralism" (Article 40.1). However, this definition does not significantly differ from the objectives of the general-interest services.

Furthermore, the LGCA Act stipulated that the general objectives of the public channels have to be established every nine years through a mandate-framework [*mandato-marco*], agreed between the public corporation and either the state or regional government. In addition, every three years these general purposes of public remit have to be reviewed through a programme-contract [*contrato-programa*]. This agreement has to show the specific ways that the public remit will be translated into the content and scheduling. For example, the percentage of each genre has to be stipulated (Article 41 LGCA). Despite the requirements of the law, the last programme-contract was signed in

2011. RTVE, the Spanish public corporation, has not signed a new agreement due in 2014 because of disputes among the different political parties and the political uncertainty of the country.

Notwithstanding the vague distinctiveness between public service and general interest services in the LGCA, there are specific Acts regarding the purposes and obligations of public service corporations. The basis of public television was established by the 1980 Statute (Act 4/1980[16]), which defined the objective and role of these broadcasters. Despite these generic definitions, no programming or content obligations were imposed on the public corporations until the transposition of the 1989 TWF Directive in 1994 (Act 25/1994). The original purposes did not change until 2006 when the concept of the public channels started to change. The 17/2006, 8/2009 and 7/2010 Acts significantly altered the basis of the public channels.

The main transformation of these acts has been the reformulation of funding of RTVE. Beginning on January 1, 2010 all its television channels and radio stations have broadcast without advertising (Act 8/2009[17]) (Farreres Fernández, 2012). The corporation is financed by:

> A direct subsidy from the state plus an allocation of 80% of the amount levied by the state through the tax on the use of spectrum frequencies and the amount collected through two new taxes: one imposed on telecommunication operators offering audiovisual services nationwide, and another imposed on commercial television companies operating nationwide (Cabrera Blázquez & Llorens, 2012, p. 64).

According to the preamble of the law, this measure "aims to secure the corporation and, therefore, favour a balanced budget to avoid risk to the continued delivery of the public service remit" (Preface Act 8/2009).

This law was also approved as a consequence of the tension created by the commercial corporations. A major channel without advertising should have meant an increase in the overall quota of the advertising shared between the other commercial channels. But this is an imperfect logic. Overcoming the initial period of confusion caused by the exit of public television from the advertising market, advertisers started to allocate a significant portion of the advertising revenue previously aimed at public television to other media outlets in order to increase their reach to other audiences. Consequently,

[16] *Ley 4/1980 de Estatuto de la Radio y la Televisión.*
[17] *Ley 8/2009 de Financiación de la Corporación de Radio y Televisión Española.*

commercial broadcasters lobbied for restrictions on public television to restrict broadcasts such as cinema premieres or major sports events to erode its audience share.

Moreover, the economic crisis considerably reduced the total amount of advertising sold on television. When the crisis finishes, it has to be seen if the level of advertising income to the general-interest channels increases again as data from 2014, 2015 and 2016 timidly seem to suggest (Barlovento Comunicación, 2017; Infoadex, 2015, 2016).

4.2.2. Spanish content regulation

Spanish media legislation also contains content regulation based on quotas. Regarding the quotas established by the directives, the European works quota has been established in Spain meeting the minimums marked by the EU and has only added some language particularities allowed by Article 5 Paragraph 2 of the AVMS Directive. In general terms, 51% of the scheduling of the channels of state and autonomous community coverage has to be allocated to European works. However, the specific nature of the Spanish market required the quotas to be adapted leading to slightly more restrictive measures. Half of the general proportion has to be reserved for content originally produced in one of the four official languages of Spain (Spanish, Catalan, Basque or Galician). Also, the Independent quota has been kept at the European common minimum of 10% and half of this time has to have been produced in the last five years. Both quotas refer exclusively to the broadcasting time, not investment of the channels, and exclude the time dedicated to news, sports events, games, advertising, teletext services and teleshopping.

These quotas have been part of Spanish legislation since 1994 when the TWF Directive was transposed (Act 25/1994). Before this adjustment to the European law, the 1988 Act *for Private Television*[18] established different quotas for commercial broadcasters to secure local and European content: 15% of in-house productions, 40% originally from European Commission Member States, 55% of the programming had to be originally in Spanish and 40% of Feature Films had to proceed from European states. These quotas produced a paradox since the commercial channels had more public remit in their scheduling than the public broadcasters. Since 1994, however, the obligations on the transmission of European works, independent productions and the promotion of the

[18] *Ley 10/1988 de Televisión Privada.*

production in any of the four official languages are the same for all the free-to-air channels (Farreres Fernández, 2012).

While for linear television the Spanish law is passive in the promotion of local and European works complying with the European minimum, it uses its areas of competence through the LGCA to strengthen the requirements for VoD services. Article 5 Paragraph 5 states: "Providers of a catalogue of programmes must reserve 30% of their catalogues to European works. Of that amount, half will be in any of the official languages of Spain". While the quota is less restrictive than for the traditional broadcasters, this measure goes beyond the requirement of the directive to simply encourage on-demand services to increase the levels of European work. This Spanish measure helps balance the requirements between the different services and aims to secure European and local content online.

The LGCA also stipulates other quotas regarding the production of European content, significantly Feature Films. These quotas, one of the most controversial sections of this act, are based on the incomes generated the previous year by each channel that has been functioning for more than seven years (including channels from the autonomous communities). The methods of investment can consist of direct participation in the production or in the acquisition of the broadcasting rights. Article 5 Paragraph 3 of the LGCA requires commercial channels to assign 5% of their investment income to Feature Films, TV Movies and TV Series as well as Documentaries and Animated Series. In addition, 60% of this quota has to be dedicated to Feature Films.

There is a quantitative difference in this quota between commercial and public channels, in contrast to the other measures that demand the same in both cases. Public channels have to allocate 6% of their income to these productions and 75% of this percentage has to be exclusively for Feature Films. However, in both cases 60% of these investments have to be productions in any of the official languages of the country, half of which has to go to independent producers. There are also specific percentages for investment in TV Movies, with 50% of the percentage not exclusively dedicated to theatrical movies both on private and public channels.

In the Act 8/2009 *of financing of the Spanish Radio and Television Corporation*[19] some other quotas specifically for the state public service were established. The ones that are related to the duality between local and imported productions are:

- f) At least 60% of peak-viewing time must be filled with movies and short movies, TV Movies, Documentaries, series and programmes of news, culture and of current affairs produced in the European Union.
- g) An increase in 20% of its obligation to invest in the production of movies, short movies, Documentaries and animated content
- h) Diversify the contracting of the exterior and imported or mixed productions, in a way that no more than 30% is concentrated in one supplier, with exception of the companies with significant strength in the market or that they have exclusivity of the exploitation rights
- i) Televisión Española [RTVE] cannot premiere, in total across all its channels, more than 52 movies in a year in peak-viewing time produced by the major international production companies (Article 9(1)).

4.3. British local content quotas

Starting again with the summary of the media system classification of Hallin and Mancini (2004), the UK is defined as a north-Atlantic country with a liberal model. These markets are characterised as being politically neutral, highly professional and reacting rapidly to market forces. Nevertheless, public service broadcasters in the UK still have a strong role despite being one of the earliest European countries to break up its public monopoly. With the 1954 Television Act and the launch of the ITV network, composed of six different franchises (Crisell, 2002), commercial television started in the British market, although in a highly regulated manner.

The liberalization of broadcasting in the British legislation starting with the 1990 Broadcasting Act resulted in a multichannel television system with high levels of competition between enlarged companies encouraged by the multiplatform context. However, there are some public interest regulations on the free-to-air channels that have not significantly changed since radio broadcasting began in 1922.

The BBC, the main broadcaster in terms of market share (Ofcom, 2016), still has the objectives to inform, educate and entertain as its main purpose, re-affirmed by the

[19] *Ley 8/2009 de financiación de la Corporación de Radio y Televisión Española.*

Charters of 2006 and 2016. Specifically, the main public purposes of the BBC are:

> (a) sustaining citizenship and civil society; (b) promoting education and learning; (c) stimulating creativity and cultural excellence; (d) representing the UK, its nations, regions and communities; (e) bringing the UK to the world and the world to the UK; (f) in promoting its other purposes, helping to deliver to the public the benefit of emerging communications technologies and services and, in addition, taking a leading role in the switchover to digital television (Section 4 Charter of the BBC, 2006).

Notwithstanding this, the BBC is not the only broadcaster with a public remit. The Public Service Broadcasters (PSBs), ITV1, Channel 4 and Channel 5, also have to accomplish different public purposes and are not only ruled by commercial aspects. While these channels are referred to as PSBs in the British market and legislation, for the aim of this study they will be referred to as commercial channels in order to distinguish them from the public BBC and also facilitate the comparison with the Spanish market.

The public responsibilities of these general-interest channels have reduced over the years but they still have to comply with differing responsibilities to secure a high-quality service. These public purposes were at the core of the last license renewals that took place in 2014. Each broadcaster has a PSB license where they receive certain benefits[20] but also agree to fulfil public service remits. These purposes are linked to specific programming content and were set by the 2003 Communications Act.

The 2003 Act became the first regulation to unify different media sectors that were previously regulated by distinct bills. This was the UK government's response to the increasing level of convergence between the media sectors at the beginning of the 2000s, which preceded the European response to convergence.

Only seven years earlier the previous major piece of legislation had been enacted (1996 Broadcasting Act). The main change by the new act of 2003 was the empowerment of the new independent regulatory body, The Office of Communications (Ofcom, created by The Office of Communications Act, 2002). The need for a unified regulator for the different media sectors was stressed by the previous *Communications White Paper* (DCMS, 2000).

[20] "The right to appropriate prominence on Electronic Program Guides ('EPGs') as well as access to spectrum that enables them to make their services available to 98.5% of the UK population on the digital terrestrial platform" (Ofcom, 2012, p. 2).

This decision was made with the belief that a single regulator would help to solve the challenges of technological advances and convergence. Ofcom assumed the responsibilities of five different regulatory bodies: the Independent Television Commission (ITC, for commercial TV), the Radio Authority (RA, for commercial radio), OFTEL (for telecoms), the Broadcasting Standards Commission (BSC, for broadcasting content) and the Radiocommunications Agency (Radio Com, for spectrum) (Doyle & Vick, 2005).

Ofcom is in charge of both economic and cultural factors with the main objective being to safeguard and control the basics of public service broadcasting (Doyle & Vick, 2005). Ofcom has to report on the fulfilment of the public service remit (Section 264(4) Communications Act 2003), to ensure the diversity and appeal of programming meet the interests and needs of as much of the audience as possible and to maintain general high standards regarding content, programme making and professional and editorial integrity. While the 2003 act sets the basics of the public remit for terrestrial general-interest channels, it empowered Ofcom to decide appropriate and definitive individual measures for these broadcasters.

> Ofcom is charged with responsibility for ensuring delivery of all quantifiable obligations – such as quotas for original or independent productions, targets for regional programming, targets for scheduling news during peak time, and rules governing party political broadcasts – that apply to the commercial and non-commercial public service channels (Doyle & Vick, 2005, p. 81).

These measures, translated mostly into content quotas, are established in the license agreements of each broadcaster. This results in the establishment of different levels of public purposes for each corporation only applying to the main channel, not to the portfolio channels of the same company. The BBC, unlike all the other commercial broadcasters, is regulated and overseen by the BBC Trust in conjunction with the Ofcom and has quotas for all its public channels.

4.3.1. British content regulation

There are four topics that are at the main core of the obligations for the generalist channels when discussing content regulation. The first is related to the broadcasting of news and current affairs in that each licensee has to broadcast a set number of hours of news and regional news. Secondly, there are the obligations for original programming, in peak and non-peak viewing hours. The other two measures in the form of quotas are the proportions of independent productions and out of London productions. The regulatory measure that is most interesting and has the greatest repercussions on this research is the original programming quota. In addition, the independent and out of London productions will be reviewed due to their indirect influence on imported programmes.

4.3.1.1. Original productions quota

The 2003 act established that the Ofcom would stipulate the appropriate amount of original productions on each channel (Section 278). This quota is established in the license of every broadcaster and separates the requirements for general and peak-viewing time per year, which Ofcom established as being between 6pm to 10:30pm. This quota is based on the time dedicated to programmes, not the value or expenditure and all programmes and genres are counted towards this quota.

The renewal of the licenses of the three commercial terrestrial channels in 2014 has not affected the original productions expected of each channel. However, there have been some variations since the issue of the 2004 licenses. The current expectations for each channel vary considerably since they are conditioned by the amount of profits and viewers each broadcaster has (Table 8). This quota has to be fulfilled by content commissioned by or for the broadcaster. Thus, it regards to local productions or co-productions.

Table 8 - Original programming quotas for commercial channels

	All slots	Peak-viewing time
ITV1	65%	85%
Channel 4	56%	70%
Channel 5	50%	40%

Sources: Adapted from Ofcom (2004, 2012, 2013).

ITV1 is the commercial broadcaster with the highest requirement of original productions due to its greater economic strength. For its part, the annual quota for Channel 4 was initially set at 60% in the 2004 license but was decreased to 56% four years later after the *Ofcom's Second Public Broadcasting Review* (Ofcom, 2009). The independent regulator argued that the softening of the quota was due to the uncertain economic conditions. The peak time quota was not changed so original programmes would be concentrated during the hours that more viewers were watching. This was changed in Condition 14 of the Channel 4 license (part 1 of the Annex).

The expectations of Channel 5 broadcasting original products have also diminished since the issue of its 2004 license. Originally, it was established that:

> At least 51 per cent by time of the program included in the Licensed Service in each calendar year shall be originally produced or commissioned for the Channel 5 Service, increasing by two percentage points each year to not less than 60 per cent in 2009 and subsequent years. At least 42 per cent of programmes in peak viewing time shall be originally produced or commissioned for the Channel 5 Service (Channel 5 license, 2004, Annex: Part 1).

Since then, it has been modified three times to finally meet 50% of its time. For the peak-viewing slot it has also been reduced but to a lower figure of 40%, which results in fewer expectations on the channel when producing original content. Furthermore, it should be highlighted that Ofcom does not exclude reruns of the programmes first commissioned for or by the channel in this category, despite encouraging the scheduling of new content for the generalist channels with a public remit (Ofcom, 2015b). Despite this, in 2013 original first runs only represented 18% of the output of local hours of Channel 5. The other broadcasters had a higher level of first runs produced or commissioned by the channel (BBC One, 75%; BBC Two, 36%; ITV1, 60%; Channel 4; 34%) (Ofcom, 2014).

The UK quota for original productions does not emulate the objectives of the European works quota although with the accomplishment of the first, the second is directly fulfilled. However, we have to distinguish between the different objectives pursued by these two measures. While both seek to strengthen and promote local audiovisual industries, the first one does not stimulate the content exchanges between the different territories of the EU that the second promotes. With the imminent exit of the country from the EU, the public service remit of these channels will not be affected since their local quotas are higher than the minimum established by the AVMS Directive.

4.3.1.2. Independent productions quota

The importance of stimulating the UK independent sector was first brought to light with the launch of Channel 4 in 1982. This broadcaster could not produce its own content but had to commission it from third parties, which helped create a vast number of independent producers.

For the rest of the generalist channels, the quota for independent productions was first introduced by the 1990 Broadcasting Act. This measure was approved after the recommendation of the Peacock Committee in 1986 to establish a quota for original programmes produced by companies independent from the broadcasters. While the recommendation was 40% of the broadcasting time, it was settled at 25% of qualifying programmes. This quota was maintained in the 2003 Communications Act which imposes the minimum of 25%, higher than the 10% required by the AVMS. Furthermore, it leaves Ofcom the ability to increase this quota to secure a wide range of programmes:

> The regulatory regime for every licensed public service channel includes the conditions that OFCOM consider appropriate for securing that, in each year, not less than 25 per cent of the total amount of time allocated to the broadcasting of qualifying programmes included in the channel is allocated to the broadcasting of a range and diversity of independent productions (Section 277(1) Communications Act 2003).

Nevertheless, Ofcom has maintained this quota at the minimum level established by the act for all generalist channels since no further adjustment has been required. From 2010 to 2014 all generalist channels, including BBC One and BBC Two, easily surpassed the 25% expected (Ofcom, 2015b). This quota does not count all the output of the broadcasters since certain programmes, like news and reruns, are excluded.

4.3.1.3. Out of London quota

Ofcom is also charged with establishing quotas for the decentralisation of the productions of programmes on the general-interest channels. The so-called Out of London quota establishes for each channel a minimum of volume and expenditure on productions made outside the M25 (the Greater London area) (Section 286 2003 Act). This measure intends to diversify both the investments and the cultural output of broadcasting of the public service remit. However, there are no specific instructions that the programmes produced out of London have to necessarily reflect that reality. Therefore, the production of programmes in different regions does not guarantee the reflection of different ways of living across the UK. Still, Ofcom argues that these programmes, at least, are more likely to reflect cultural diversity.

ITV1 is the commercial channel whose aim is to generate the most regionally diverse output and since its launch in 1955, this channel has counteracted the London-centric point of view of the BBC. The regional system was divided into different franchise areas in which different broadcasting companies had an exclusive license. In spite of this, since the beginning the channel has operated as an integrated system (Crisell, 2006) and with new liberalization measures currently the majority of licenses fall under the same company, Independent Television PLC (ITV).

However, specific regional content quotas still have to be fulfilled, especially on news and current affairs programmes which have a higher quota level for out of London productions (Table 9). In 2005 Ofcom decided to increase this quota to 50% in both spend and volume, previously being 40% of expenditure and 33% of volume. However, it was soon seen that this was not economically viable for ITV and that the main reason to increase the quota, cultural diversity, was not being fulfilled. In 2009, with the revision of the *Public Service Review*, the quota was set at 35% of volume and spend (Ofcom, 2012).

Channel 4 has different expectation of volume and value in the Out of London quota. While the channel only needs to broadcast productions from outside the M25 in 30% of its scheduling time, this has to be 35% of the expenditure of the channel (Ofcom, 2013a). In addition, Channel 4 has a further quota related to the decentralisation of production, the Out of England quota. While most content is produced in England, specifically the London area, a minimum requirement of programming from the other regions of the UK, Scotland, Wales or North Ireland, has to be accomplished. In the license renewal of 2014 this quota was expanded from 3% to 9%, both in volume and spend but this measure will not be applicable until January 1, 2020 (Ofcom, 2013).

For the renewal of the Channel 5 license in 2014, it was requested that Ofcom remove the Out of London quota arguing that production centres outside London were already clearly established and a 10% quota was detrimental to commercial interests (Ofcom, 2012). Ofcom rejected this proposal and maintained that the 10% quota is sustainable and helps to broaden the diversity of the other broadcasters.

Table 9 - Out of London quotas for commercial channels

	Volume (hours)	Investment
ITV1	35%	35%
Channel 4	30%	35%
Channel 5	10%	10%

Sources: Adapted from Ofcom (2004, 2012, 2013).

4.3.1.4. BBC quotas

The agreement between the Department for Culture, Media and Sports (DCMS) with the public broadcasting corporation linked to the 2006 BBC Charter established that “the content of the BBC’s UK Public Services must be high quality, challenging, original, innovative and engaging, with every program or item of content exhibiting at least one of those characteristics" (DCMS, 2006, p. ii). In this case, and in contrast to the commercial channels, the agreement includes the main channel, the rest of the channels and radio stations of the corporation. However, it does not include the BBC commercial services such as BBC Worldwide.

In the agreement, the character of each channel is defined so it can present a complete public service across all TV and radio channels. BBC One is described in the 2006 agreement as well as in the renewed agreement of 2016 as "a mixed-genre channel, with versions for Scotland, Wales and Northern Ireland and variations for English regions, providing a very broad range of programmes to a mainstream audience" (DCMS, 2016, p. 49). The definition of BBC Two is the same but only adding "but with a particular focus on factual programmes, innovative comedy and drama" (DCMS, 2016, p. 49).

The quotas for original programming for the two main BBC channels are greater than that of the commercial broadcasters, in contrast to Spain where public channels have the same obligations as commercial channels. In addition, the requirements for original productions in peak-viewing time are higher on the main channel, BBC One, than in BBC Two.

Table 10 - Quotas for BBC channels

	BBC ONE	BBC TWO
Original programming	70%	70%
Original programming peak time	90%	80%
Independent production	25%	25%

Source: Adapted from BBC (2016).

4.3.2. British regulation of VoD Services

The transposition into local law of the 2007 AVMS Directive took place on December 19, 2009 with the *Audiovisual Media Services Regulations 2009*. This piece of legislation was mainly concerned with the incorporation of a new legal definition of on-demand programme services according to that established by the EU since VoD services were already under legislative scope in the UK. Furthermore, it enabled Ofcom to appoint a co-regulator for on-demand platforms (Section 368B(1)). In addition, it became compulsory to have a license for services provided over the Internet, previously excluded by the 2003 act.

In 2010 Ofcom decided to use its right to designate a co-regulator to oversee on-demand platforms and the Authority for Television On Demand (ATVOD) was created. This independent regulator, under Section 368B(1) of the 2003 Act, had responsibilities concurrent with Ofcom which were related to the editorial content of on-demand services.

One of its responsibilities was the promotion of European Works: "the appropriate regulatory authority must ensure that providers of on-demand program services promote, where practicable and by appropriate means, production of and access to European works (within the meaning given in Article 1(n) of the Audiovisual Media Services Directive)" (Section 368C (3) (Amendment 2009)). Among other initiatives, ATVOD created the *European Works Plan 2012-2015* and, as in the case of the directive, ATVOD did not designate specific quotas for on-demand companies. "ATVOD's strategy is based on encouragement, collection of data and provision of information" (ATVOD, 2012, p. 2). Not surprisingly, the UK was a firm opponent of the regulation of online services in the EU.

In 2015 Ofcom decided to eliminate the co-regulator ATVOD and to take direct responsibility. This decision was made due to the increasing convergence between linear television broadcasting and online services creating overlapping identities. Starting on January 1, 2016, Ofcom has acted as sole regulator on all the measures enabled by the act. As with ATVOD, Ofcom has only promoted original and European works in the catalogues of on-demand services but has not implemented concrete measures to secure specific results.

The Digital Economy Act of 2010 also demands different commitments within the online broadcasting sector. Specifically, it adds a section to the 2003 Communications Act regarding the media content of Channel 4, which stipulates the requirement of high quality programmes to be distributed on a range of different platforms, not only terrestrial broadcasting. This requisite adds to the large number of public objectives implemented at the launch of the channel in 1982 (Crisell, 2006). Its main objective was, and still is, to broadcast content which appeals to minorities.

> Additionally, Channel 4 has a specific public service remit to demonstrate innovation, experimentation, and creativity; to appeal to the tastes and interests of a culturally diverse society; to make a significant contribution to include programmes of an educational nature and of educative value; and to exhibit a distinctive character. These are also included as conditions in the license (Ofcom, 2013, section 1(1.6)).

4.4. Partial conclusions: The continuing necessity of broadcasting policy

Broadcasting is in a high speed cycle of changes that makes it difficult to predict what model will be dominant in the future, even over the next few years. As outlined in the AVMS Directive, "on-demand audiovisual media services have the potential to partially replace television broadcasting" (Article 69 AVMS Directive).

Before digitalisation, sector-specific regulation was clearly needed in order to protect and promote the cultural and social functions of television and not leave the audiovisual market solely in the hands of market forces. This requirement directly led to content regulation measures to secure these functions, primarily the European Works quota at the European level and the original programming quota in the UK. Despite all the debate and the uncertain effect on schedules, this guarantees a minimum quantity of European programmes, local or from other Member States, which is broadly accomplished by European channels (Lange, 2014). Furthermore, it clarified cultural and identity diversity as concerns of European politicians.

The changes in the television sector and the convergence with other less regulated platforms, like telecommunications and the Internet, again brought up the question of the necessity or not of content regulation. Iosifidis (2014) argued four reasons why regulation continues to be needed as much as in the years of the TWF Directive. Firstly, the socio-cultural objectives of media and its democratic role have to be preserved and commercial channels, with high levels of competition, may not focus on that. Thus, public media is still important and necessary. Secondly, even with technological advances, the spectrum is still limited and has to be managed. Thirdly, regulation ensures universal access to media and establishes adequate standards over all the different systems in use. Fourthly, the market always tends to concentrate and without regulation pluralism would be impossible to achieve.

The lower levels of regulation of VoD services questions the future of media regulation, especially content measures. Nonetheless, the AVMS, with much controversy, managed to establish a level of basic minimums, which may be extended with a possible future quota for European Works established at 20% (Katsarova, 2016). While the platform is different, audiovisual programmes transmitted online still preserve the cultural aspects continuing the need to not only regulate them under the competition regulation.

However, quotas focusing on volume available are not certain to have a real impact on VoD services since the mere presence of European content, if not promoted in the same manner as other content, may not be considered by viewers. In the new multiplatform context and the impossibility in protecting the state borders from foreign content, "the probability that the contents of the local industry, bearers of cultural values and identities, become part of the menu of each citizen decreases exponentially" (Prado, 2015, p. 52). While content quotas are still important and play a significant role in the current television industry where linear schedules dominate, local legislators also need to take action to encourage investment, quality and visibility of local programmes to secure the economic and cultural viability of their audiovisual industry (Prado, 2015)

METHODOLOGY

5. METHODOLOGY

This chapter will outline the methodological design performed in order to accomplish the main objective of unveiling the industry practices of local broadcasters behind the acquisition process of canned international television programmes and other secondary objectives. Firstly, five research questions and four hypotheses are formulated. Secondly, the different phases of the research will be presented. In the following section, the sample selected for the study will be described and justified. The last two sections will analyse the specific considerations of the quantitative content analysis of the schedules of season 2014-2015 and the in-depth interviews with the Acquisitions Executives of the sample.

5.1. Research questions and hypothesis

In order to accomplish our objectives, and considering the theoretical framework, the following research questions (RQ) have been formulated:

- RQ1: How are the acquisition departments organised in the local broadcasting corporations and how does this affect the roles played by the Acquisitions Executives?
- RQ2: Which factors affect the decision on which international programmes to acquire?
- RQ3: What relationship do local corporations have with international distributors and what terms do they negotiate?
- RQ4: Which imported programmes are present on the online platforms of the broadcasters?
- RQ5: How have the changes in the television sector prompted by digitalisation and the appearance of new players such as VoD services affected the acquisition process of traditional broadcasters?

In addition, four hypotheses were proposed:

- H1: "Commercial channels with a lower share in both markets (Cuatro, La Sexta, Channel 4 and Channel 5) have a higher proportion of imports and a higher diversity of genres with imported programmes than the market leaders".
- H2: "Public channels have a lower proportion of imports since they prioritise local productions".
- H3: "Public channels acquire their imported programmes from a wider variety of sources due to their public service obligations".
- H4: "The British market has a higher proportion of imported content on their online platforms than the Spanish".

5.2. Methodological design

With the main objective of unveiling the industry practices of buying imported television programmes, this research has used two different methodologies: content analysis of television schedules (quantitative) and semi-structured interviews with Acquisitions Executives (qualitative).

The purpose of the content analysis of the schedules is to evaluate the quantitative presence of imported programmes in the programming. This will allow the contextualisation of each channel and to make comparisons between them. In addition, it will assist in verifying some of the aspects addressed in the interviews and confirm or reject the four hypotheses previously outlined.

The use of semi-structured interviews was considered appropriate to examine the objectives of this research since the point of view of the executives is essential to have an accurate interpretation of how local corporations acquire imported television programmes. According to Lindorf (1995), some of the basic objectives of qualitative interviews are to gain knowledge of aspects that cannot be observed directly, understand the point of view of a particular actor and validate results obtained from alternative research methodologies.

Our purpose is to understand the practices Acquisitions Executives, also referred to as Television Buyers (Kuipers, 2012; Smith Maguire & Matthews, 2012), follow when purchasing imports that will be scheduled on their channels. Their perspective is essential in accessing this information since it is a subject not generally studied in depth in Media Studies and in our sample markets (Spain and the UK) specifically. Two examples of researches that have interviewed Acquisitions Executives are Kuipers (2012), which analysed executives from France, Italy, Poland and the Netherlands focusing on the role personal taste and professional ethos have in the industry practices of these executives, and Havens (2006), who interviewed executives from the Hungarian market.

This research has been divided into three different phases:

1- Content analysis of the scheduling: this part of the study was conducted in the first stage of the collection of data. The results on the presence of imported programmes on each channel and their overall scheduling logics were used to thoroughly prepare the following interviews.

2- Interviews with Acquisitions Executives: with the results from the content analysis and the considerations from the theoretical framework, the semi-structured in-depth interviews were structured.

3- Crossing of data: both sections were combined to obtain the final results, the responses to the objectives and research questions of the study. In addition, the outlined hypotheses were tested.

The quantitative database created with the data from the content analysis was implemented in Excel. For a more effective and detailed exploration, the software R 3.3.1, which is an open source statistical software operated by its own programming language, was used for the data analysis. The interviews were entirely transcribed and analysed with the qualitative research software Nvivo 10.

5.3. Selection and description of the sample

The markets included in the sample of this research are Spain and the UK. The reasons for conducting a comparative study with these two markets can be explained by three main reasons. Firstly, they are two of the main European television markets in terms of population[21]. Second, they use two of the most spoken languages in the world, which means that products in the same language can be purchased from other countries. Some scholars such as Wilkinson (1995), Straubhaar (2013) or Sinclair (2000) pointed out that sharing a language is one of the main reasons for cultural proximity and for the creation of television linguistic markets. While this may be true for the English language, it seems

[21] Population of Spain in 2015: 46,4 million (Insituto Nacional de Estadística).
Population of the UK in 2015: 65,1 million (Office for National Statistics).

more unlikely with regards to Spanish. In Spain audiences are accustomed to watching programmes that have been dubbed and even if it is the same language, the accent is very different and unfamiliar. Third, the public channels of both countries (RTVE and BBC) broadcast free of advertising even though they have different sources of funding. While the BBC has never included advertisements, RTVE started to air with no ads in 2010.

In addition and as already commented, both markets have had similar processes of digitalisation and completed their digital switchover in 2010 and 2012, respectively. Furthermore, the BBC has been a role model in the creation of catch-up TV systems and the Spanish public corporation has attempted to follow the same model. Nevertheless, the pioneer in Spain was another public corporation but from the region of Catalonia, CCMA, also included in the sample, which was the first European television to create a digital repository. Furthermore, a personal interest and closeness to the television framework of these two countries encouraged the final selection.

The television channels were chosen with a non-probabilistic intentional sample that includes the main free-to-air general-interest channels. Even though audience fragmentation is more visible and these channels are losing a percentage of their market share, they continue to have the majority of the audiences and still receive the most focus from their broadcasting company.

Six channels meet these characteristics in Spain, two public (La1 and La2) and four commercial (Telecinco, Cuatro, Antena 3 and La Sexta). In addition, a seventh channel was added to the sample, TV3, which is the public regional channel of the autonomous community of Catalonia. The reason for adding this channel to the study is due to this research being conducted at the Universitat Autònoma de Barcelona and therefore this channel is a free-to-air generalist broadcaster in the region where the study is set. Furthermore, it is the market leader in Catalonia.

Due to the strong oligopoly of the market, the seven Spanish channels included in the sample belong to four corporations, one of which is regional. Only three corporations combined reach 74.5% of the total market share. As seen in the regulation chapter, the economic crisis favoured the merger of the free-to-air television corporations. These new resulting companies have two generalist and several portfolio channels, as can be seen on Table 11.

Table 11 - Share of the Spanish channels in 2015

Corporation	Ownership	Share of Corporation	N. Portfolio Channels	General-interest Channels	Share of Channel
RTVE	Public	16.7%	3	**La1**	9.8%
				La2	2.7%
Mediaset	Commercial	31%	4	**Telecinco**	14.8%
				Cuatro	7.2%
Atresmedia	Commercial	26.8%	3	**Antena 3**	13.4%
				La Sexta	7.4%
CCMA	Public		4	**TV3**	12.5%

Source: Barlovento Comunicación (2016).

Mediaset is the Spanish biggest television conglomerate with 31% of market share in 2015. Its main channel, Telecinco, gained the highest share for the fourth consecutive year with 14.8%, 0.3% more than the previous report, and with a 1.4 point lead over the second placed channel in the market, Antena 3. The second general-interest channel of Mediaset, Cuatro, also increased in 2015 to 7.2% compared to the preceding year (6.7%), although remaining behind its direct competitor La Sexta (7.4%). In addition, the four Mediaset portfolio channels (FDF, Divinity, Boing and Energy) won 8.9% market share of which FDF was the highest rated DTT portfolio channel with 3.5%.

Atresmedia is the second largest commercial corporation in Spain and in 2015 obtained a share of 26.8%, 4.2 points behind Mediaset. The main channel of the group, Antena 3 (13.4%), received 2 decimals less than the previous year. Regarding its second general interest channel, La Sexta (7.4%) achieved its best ever results in 2015 with an increase of 0.2 points. The corporation Atresmedia had 5.9% of the market with its three portfolio channels (Neox, Nova and Mega). Additionally, a new HD channel, Atreseries, was launched in December 2015.

The third Spanish television company with more market share is the public state corporation. RTVE has lost a significant proportion of its viewers in recent years partly due to audience fragmentation, as have the rest of the channels, but also because of economic struggles and difficulties in connecting with viewers after many complaints of politicisation. In 2015, RTVE obtained a global share average of 16.7%, far behind its main competitors.

The channel that has suffered most is the main channel, La1, with a feeble 9.8% in 2015, 0.2 less than the previous year. Furthermore, over the past 10 years the channel has lost 8.5% of its share, while Telecinco has lost 6.4% and Antena 3 only 6% (Barlovento Comunicación, 2016). However, during this decline it took the leadership three years in a row coinciding with the first years of broadcasting with no advertising (2009-2011). The perception of political independence of the News programmes during the reforms taken by the Socialist government with the presidency of José Luis Rodríguez Zapatero also helped the popularity of the channel. However, in 2012, matching the arrival in power of the right-wing party *Partido Popular*, the market share of the channel and the entire corporation began to drop due to the complaints about the worrying increase in governmental interference.

The second channel of the corporation, La2, has also suffered a similar decline in ratings with only an average of 2.7% of the market share in 2015. Regarding its portfolio channels, RTVE had 4.2% of share with the CLAN thematic channel aiming at Children, 24h for Information programmes and finally Teledeporte for sports content.

The last corporation included in the Spanish sample is the public media corporation of the autonomous community of Catalonia. The Corporació Catalana de Mitjans Audiovisuals (CCMA) is comprised of five television channels, two of which share the same frequency, with only one general-interest channel, TV3. CCMA is part of the *Federación de Organismos o Entidades de Radio y Televisión Autonómicos* (FORTA), which is a federation of the public regional media corporations of autonomous communities created in 1989. On average, the regional public channels obtained a market share of 7.5% in 2015, 0.5 points less than the previous year. Driven by general audience fragmentation, these channels have suffered a major decrease compared to 11.3% in 2010 and 15.4% in 2006 (Barlovento Comunicación, 2016).

Nevertheless, TV3 is the only public regional channel that leads its regional market with 12.5% in 2015, only one decimal less than the previous year. In addition, it has maintained its position as the leader of the market for six years in a row being the largest among the regional channels despite a decreasing share.

In the UK, five channels are included in the sample, two public (BBC One and BBC Two) and three commercial (ITV1, Channel 4 and Channel 5). In this case, it has to be highlighted that the schedules of the British channels analysed are those aired in London. Thus, in Spain the schedule research is set in Barcelona while in the UK it is set in London making a total sample of 12 channels.

Table 12 - Share of the British channels in 2015

Corporation	Ownership	Share of Corporations	N. Portfolio Channels	General-interest Channels	Share of Channels
BBC	Public	6	32.8%	**BBC One**	21.9%
				BBC Two	5.7%
ITV	Commercial	5	21.3%	**ITV1**	14.2%
Channel 4 Corporation	Commercial	4	10.6%	**Channel 4**	4.8%
Channel 5 Corporation	Commercial	3	7.8%	**Channel 5**	3.9%

Source: Ofcom (2016).

While in Spain the main free-to-air corporations have two general-interest channels, as a consequence of the mergers, in the UK the main five generalist channels belong to four different companies. The BBC, the public corporation, is the only one with two free-to-air generalist channels, BBC One and BBC Two. This gives the BBC an extra advantage to position itself as the clear leader in the UK in terms of share. In 2015 it reached 32.8% of the British television market, 11.5 points above ITV.

In terms of individual channels, the frontrunner is, unarguably, BBC One with 21.9% in 2015, an advantage of 7.7 points over ITV1. This channel is the only free general-interest channel that has increased share in the last five years, albeit moderately (20.8% in 2010) (Ofcom, 2016). BBC Two is far behind the ratings of BBC One and in 2015 it only gained 5.7% of the market, a portion that has been decreasing in recent years. The BBC had six different portfolio channels in 2015 reaching 5.2% of market share (BBC Three and BBC Four were both only on air from 7pm to passed 3am, CBeeBies, the CBBC channel, BBC News and BBC Parliament). However, on January 1, 2016 BBC Three ceased linear transmissions and became an entirely online channel.

ITV1 is the commercial channel with the highest share at 14.2% of the British market in 2015. ITV is the corporation that has the highest share for its portfolio channels. However, it is also the British corporation with the highest number of free-to-air channels. In addition to ITV1, it has ITV2, ITV Be, ITV3, ITV5 and Citv, all portfolio channels, which had 7.1% of the market share in 2015.

The other two corporations, Channel 4 and Channel 5, reach significantly less of the market share. In 2015 Channel 4 gained 4.8% of the market. Its ratings have shrunk in recent years due to audience fragmentation despite always having ratings below the main two general interest channels. In 2010 its share was 6.2%. The same corporation also has four portfolio channels (E4, More4, Film4 and 4Seven), which combined had 5.8% of share in 2015. All its channels situate the Channel 4 brand as the third place free-to-air television corporation.

Channel 5, established in 1997, was the most recent free generalist channel to be launched in the UK and it has the lowest level of public service remit. It is also the channel with less market share with only 3.9% of the market in 2015. Its portfolio channels (5Star, 5USA and Spike) received 2.1% of viewers to bring the total of the corporation to 7.8% of the market. Channel 5 was acquired by Viacom in May 2014, an international media company which has several channels such as MTV and Nickelodeon.

While the Spanish and British markets have a similar number of free-to-air generalist channels, the situation is markedly different between the two countries. Each has to be considered since it influences their scheduling strategies regarding imported programmes. Thus, it also affects how corporations structure their acquisitions departments to fulfil their needs.

In Spain, commercial channels are in a strong position and clearly dominate the market. Furthermore, the recent mergers have allowed them to structure their strategies across all their channels including the two generalists in each corporation. This leaves the public channels in a weak position. In contrast, in the UK the public corporation is the strongest in the market with a clear advantage against the commercial channels. Also, the commercial channels have significant differences with ITV1 with the largest market share and Channel 4 and Channel 5 only having a small percentage.

5.4. Content analysis

To begin the quantitative content analysis of the schedules of the twelve channels, the linear scheduling of the week from Saturday March 21, 2015 to Friday March 27, 2015 was recorded. That sample is a non-eventful regular week of the television season 2014-2015 which allows us to study the scheduling units of the overall season. While this sample would be insufficient to represent the content aired in each of the programmes, the aim is to analyse the genres scheduled, not the programmes *per se*. Thus, while it is not representative of the whole season in terms of content, it is a sample size that has been proven valid by previous research for studying the scheduling structure (see Prado & Delgado, 2010; Moragas & Prado, 2000).

The hours analysed include all day slots established by Euromonitor[22] which are considered to mirror the consumption habits of the local audiences in Spain and the UK (Table 13). While there are some differences between the schedules of the two countries, this standardised classification will allow the comparison of the strategies with no altering of the distinct daily routines.

Table 13 - Slots established by Euromonitor by country

	Spain	UK
Morning	07:00-13:30	06:00-11:30
Midday	13:30-15:30	11:30-14:00
Afternoon	15:30-18:30	14:00-18:30
Evening	18:30-20:30	18:30-20:00
Prime Time	20:30-22:30	20:00-22:30
Night	22:30-01:00	22:30-01:00

Source: Adapted from Prado and Delgado (2010).

Twenty-one variables have been considered for the analysis. After the descriptive information of the programmes regarding corporation, channel and day of the week, they have been classified at three different levels corresponding to the classification established by Euromonitor: macrogenres, genres and microgenres (Prado & Delgado, 2010). The first level is macrogenres where we find the general categories of the content: Fiction, Information, Infoshow or *Infotainment*, Show, Game Contest, Sports, Children, Youth, Education, Religious and Others. The middle level is genre, which displays the formal characteristics of the content. In Table 14 all the genres included in each macrogenre are displayed with two important points to consider. For Fiction, the most common genres will often be separated into Serialised Fiction and Non-Serialised Fiction. In the first category, the genres included are Series, Serial, Sitcom, Mini-Series, and Animation Series. In the second, the main genres are Feature Films and TV Movies. Regarding Infoshow, it is important to highlight that the common use of the genre Factual Entertainment includes the Docuseries, Docusoap and Docucomedy genres established by Euromonitor. Finally, the third level of the classification is microgenre, which describes the tone of the content and will only be used as secondary information in this paper.

[22] Euromonitor is a permanent observatory of television in Europe created by a group of European researchers (Paolo Baldi, Ian Connell, Claus Dieter Rath and Emili Prado) with the support of the RAI VQPT service and operational since 1989. Until 1995 it was coordinated in Geneva and from that date it was transferred to the Universitat Autònoma de Barcelona where it operates under the direction of Emili Prado, Professor of Audiovisual Communication and Advertising. The headquarters team also includes coordinators of national reports to Senior Lectures Matilde Delgado, Núria García-Muñoz, Gemma Larrègola and Lecturer Belén Monclús.

Table 14 - Macrogenres and genres established by Euromonitor

FICTION	INFORMATION	INFOSHOW	SHOW	GAME CONTEST	SPORTS
Animation Film Animation Serial Animation Series Animation Short Film Animation Sitcom Animation TV Movie Cinema Microseries Miniseries Serial Series Short Film Sitcom Theatre TV Movie	Current Affairs Container Debate Documentary Report Event Interview Face to face News Magazine Mini Magazine News Magazine	Humor Content Chat Docucomedy Debate Docudrama Interview Reality Game Docuseries Docusoap Cathodic Court Reality Show Talk show	Candid Camera Circus Container Debate Special Festival Gran Gala Humor/Satire Magic Music Sexy Show Play-acting Varieties	Game (tests) Quiz (questions)	Sports News Container Recorded Broadcast Live Broadcast Report Magazine Mini Magazine Summary
CHILDREN	**YOUTH**	**EDUCATIONAL**	**RELIGIOUS**	**OTHERS**	
Animation Costumes Animal Fiction Model Animation Animation Animation Puppet Live- action/Animated Storytelling Container Cartoon Diverse Education Report Religious Programmes Fiction Information Info-show Game Show Magazine Stage Magic Mini Magazine News Sport Show Play-acting Videogames	Animation Collage Container Cartoon Debate Diverse Education Report Religious Programmes Fiction Information Info-show Game Show Magazine News Sport Show Music Videos	Language Course Container Training Postgraduate Schooling Undergraduate	Mass Religious Magazine	Archive Others Classical concert Cinema promotion Kitchen Container Capsule Consumer protection Divulgation Festival Folklore Gymnastics Infomercials Industrial information Natural Environment Programme Promotion Bullfight Tribune/Access Teleshopping	

Source: Adapted from Prado & Delgado (2010).

Each programme has also been classified by its type of production. We have considered three categories already explained in the previous chapters: local, where the content is entirely produced in the country; imported, if it comes from another country; and co-produced when the product has been made with the collaboration between a company in the local market and a party from another country. The content co-produced by two or more parties outside the country of broadcasting is part of the second category (imports). After this classification, only imports have been considered to fill the variables Source, Original channel (only if originally aired on television), Year/s of the original broadcast, Simulcast and Catch-up.

Regarding the last two variables, Simulcast and Catch-up, it should be highlighted that the content analysis of the online platforms of the channels was analysed during the sample week to study the presence of imported programmes. The data was collected in two different phases. Firstly, during the linear airing of imported content the websites of the corporations. Second, the catch-up platforms were searched the day after the broadcast so corporations had the necessary time to make the content available.

Two pre-tests were organised to compose the twenty-one final variables included in the analysis. The first pre-test was part of the final project of the Official Master's Degree in Audiovisual Communication and Advertising Contents dissertation, which was focused on only two of the channels of the present sample, Telecinco and Antena 3. This pre-test only included the analysis of the linear scheduling. Therefore, a second pre-test of the schedules of a complete day was conducted including the entire sample and the online platforms. This revealed that imports on the website and the app were the same in all cases. Thus, the sample analysis was filled with only information from the website due to easier access to the content. The online platforms of each corporation analysed are:

- RTVE: A la carta
- Mediaset: Mi tele
- Atresmedia: Atresplayer
- CCMA: 3alacarta
- BBC: iPlayer
- ITV: the ITV hub
- Channel 4 Corporation: All4
- Channel 5 Corporation: My5

Furthermore, the original intention was to gather the information of how long the imported programmes were available for catch-up. However, due to the difficulty in obtaining this data, specifically for the Spanish channels since in the UK the final availability date was visible, it was discarded for the purposes of this research. In addition, during the Master's dissertation it became apparent that the analysis of two sources was insufficient in order to obtain all the information regarding origin of imported programmes, so it was increased to four different sources.

In Table 15 all the variables and categories of the content analysis are presented.

Table 15 - Variables and categories of the content analysis

Variables	**Categories**
Country	Spain (SP)
	United Kingdom (UK)
Corporation	RTVE
	Mediaset
	Atresmedia
	CCMA
	BBC
	ITV
	Channel 4 Corporation
	Channel 5 Corporation
Channel	La1
	La2
	Telecinco
	Cuatro
	Antena 3
	La Sexta
	TV3
	BBC One
	BBC Two
	ITV1
	Channel 4
	Channel 5
Type of Ownership	Public
	Commercial
Date	
Day	Weekdays
	Weekend
Title of the program	
Episode	
Start time	
End Time	
Duration	
Slot (Table 13)	Morning

	Midday Afternoon Evening Prime Time Night
Macrogenre (Table 14)	Fiction Information Infoshow Show Game Contest Sports Children Youth Educational Religious Others
Genre (Table 14)	
Microgenre	
Type of Production	Local Imported Co-production
Source of the programme (1-4)	
Original channel	
Year/s original air	
Simulcast	Yes No
Catch-up	Yes No

5.5. Interviews with industry experts

During the preparation of the in-depth interviews, several exploratory interviews were conducted with other executives related to the acquisition process but not part of the sample. While these interviews were not included in the results of this study, they helped to prepare the official sample and to further understand the object of the research.

- Marlene Dias and John Stables, Senior Executives of Ofcom, UK.

- Ana Durández, former Head of Acquisitions at Sogecable, Spain.

- Alejandro Flórez, Content Senior Director of Discovery Communications in Spain and Portugal. Former Head of Acquisitions at La Sexta, NBC Universal (Spain), Sogecable and Telemadrid (public regional channel of Madrid), Spain.
- Jesus Higuera, Head of Acquisitions at Euskal Irrati Telebista (ETB, public regional channel of the Bask Country), Spain.
- Francisco Rodriguez, Film Acquisitions Executive at Canal+, Spain.

The twelve different channels of our sample belong to only eight different corporations: RTVE (La1 and La2), Mediaset (Telecinco and Cuatro), Atresmedia (Antena 3 and La Sexta), CCMA (TV3), BBC (BBC One and BBC TWO), ITV (ITV1), Channel 4 Corporation (Channel 4) and Channel 5 Corporation (Channel 5). Since acquisition departments work across all the channels of their company, eight interviews were conducted encompassing all the channels of the sample. Due to the difficulty in accessing this professional class, it took one year to arrange and meet with all the corporations.

All the interviews were held at the offices of each corporation with the Spanish interviews in the Madrid area, except for CCMA that was in Barcelona, and the British channels in London. The only corporation which did not agree on a face to face interview was the BBC and instead, questions were answered by the Head of Program Acquisitions, Films and Series, Sue Dicks by email. This produced a lower level of information on the corporation which had to be compensated with a thorough analysis of the data on their website and information in trade journals and newspapers.

In each case, the person initially contacted via email was the executive with the highest level of seniority in the acquisitions department. However, in some cases, specifically Channel 4 and Channel 5, this person delegated the task to a colleague. The eight executives interviewed are:

Table 16 - List of the acquisitions executives interviewed

RTVE	Miguel Ángel Morales	Acting Head of the Acquisitions Department - Fiction Acquisitions Executive	January 22, 2016	59’
Mediaset	Ángel López	Head of Editorial Department and Acquisitions	June 9, 2015	1h01’
Atresmedia	Javier Iriarte	Sub-director of Scheduling - Head of Acquisitions	April 16, 2016	1h17’
CCMA	Carles Blanch	Head of acquisitions	May 18, 2015	45’
BBC	Sue Deeks	Head of Program Acquisitions, Films and Series	November 10, 2015	By email
ITV	Sasha Breslau	Head of Acquired Series	September 16, 2015	47’
CHANNEL 4	Kirsty Ames	Acquisitions Executive	November 25, 2015	45’
CHANNEL 5	Marie-Claire Dunlop	Acquisitions Executive and Channel Manager	July 6, 2015	52’

While each interview was adapted to ask concrete information regarding their specific channels and the imports scheduled on them, all were structured into five different blocks:

A) Context of the acquisitions department in the corporations
B) Acquisition process
C) International distributors
D) Schedule season 2014-2015
E) Online platforms and new players

Firstly, information about the acquisition department and their relationships with other areas was asked as a mode of introduction and to contextualise each case (RQ1). Second, specific questions on how imports are approached in the corporation and specifically on their general-interest channels were asked. Furthermore, the focus was put on the specific factors influencing their decisions when selecting imported programmes (RQ2). Third, general questions on how the relations with distributors are and how the negotiations take place were raised (RQ3). Fourth, since the quantitative content analysis was already made, specific comments about the schedule during season 2014-2015 were asked. Finally, their point of view on online rights and the new audiovisual players was noted (RQ4 and 5).

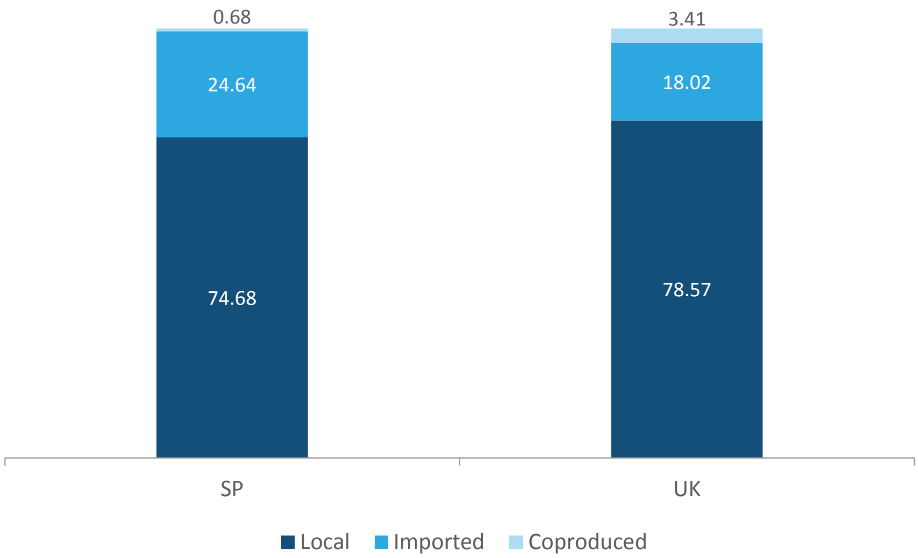
It is important to state that personal questions such as professional background were not asked since the main purpose was to understand the current role of the Acquisitions Executives within the corporation and the tasks undertaken by their department.

RESULTS

6. IMPORTED CONTENT IN THE SPANISH AND BRITISH SCHEDULES

In this section, the main characteristics of imported content in the schedules of our sample will be presented to further analyse the acquisition process of international television programmes in Spain and the UK in the following chapters.

Chart 5 - Schedules by types of production separated by country. Season 2014-2015



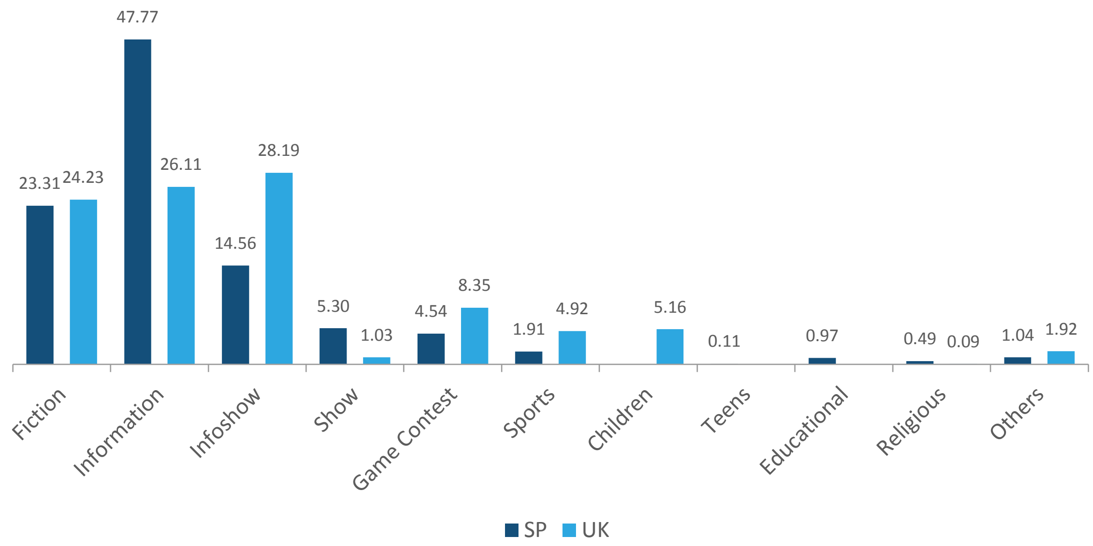
The presence of imported programmes in the Spanish and British markets is 24.64% and 18.02% of the scheduling time of free-to-air general-interest channels in season 2014-2015. In general terms, local productions clearly dominate the programming of the two markets, representing around three quarters of the broadcasting time in Spain and the UK (SP[23], 74.68%; UK, 78.57%). Nevertheless, imports have a quantitative importance in both countries despite Spain showing a slightly higher dependency on the international market than the UK

[23] Abbreviation of Spain.

by 6.62 points. In addition, co-productions, programmes made by the same country partnering with another market, are a meagre 0.68% in Spain and a lowly 3.41% in the UK.

Imported content is not equally distributed across the entire schedule but it tends to concentrate in certain macrogenres and slots while others have a greater quantity of local productions. Furthermore, the differing scheduling strategies of general-interest channels during weekdays and weekends also influence the amount of imported content present.

Chart 6 - Schedules by macrogenres separated by country. Season 2014-2015



Focusing firstly on the macrogenres, Chart 6 displays the general scheduling distribution in both countries, for all slots. As can be seen, there is a clear dominance by three macrogenres: Fiction, Information and Infoshow (or *Infotainment*), which occupy 85.64% of the time in Spain and 78.53% in the UK. This trend has also been previously confirmed for these two countries and the other main EU markets (Germany, France and Italy) (Delgado & Prado, 2012; Delgado, Prado, & Navarro, 2017; Prado & Delgado, 2010).

Regarding the three principle macrogenres, Spain has major imbalances between them since Information occupies nearly half of the schedule allocating Fiction and Infoshow significantly less time. In contrast, the UK distributes the time dedicated to the three main macrogenres almost equally. Additionally, it is worth highlighting that the content with the most broadcasting time in this market is Infoshow, which has been increasing in recent years (Delgado & Prado, 2010; Delgado et al., 2017).

Due to the high percentages of these three macrogenres, the rest of the categories are secondary in the schedules of our sample. In Spain there are Game Contests (8.35%), Show (5.30%) and, to a lesser extent, Sports (1.91%), Others (1.04%), Educational (0.97%), Religious (0.49%) and Youth (0.11%). In the UK, the categories following Fiction, Information and Infoshow are Game Contest (8.35%), Children (5.16%) and Sports (4.92%) while the rest of the British programming is dedicated to Others (1.92%) and Show (1.03%).

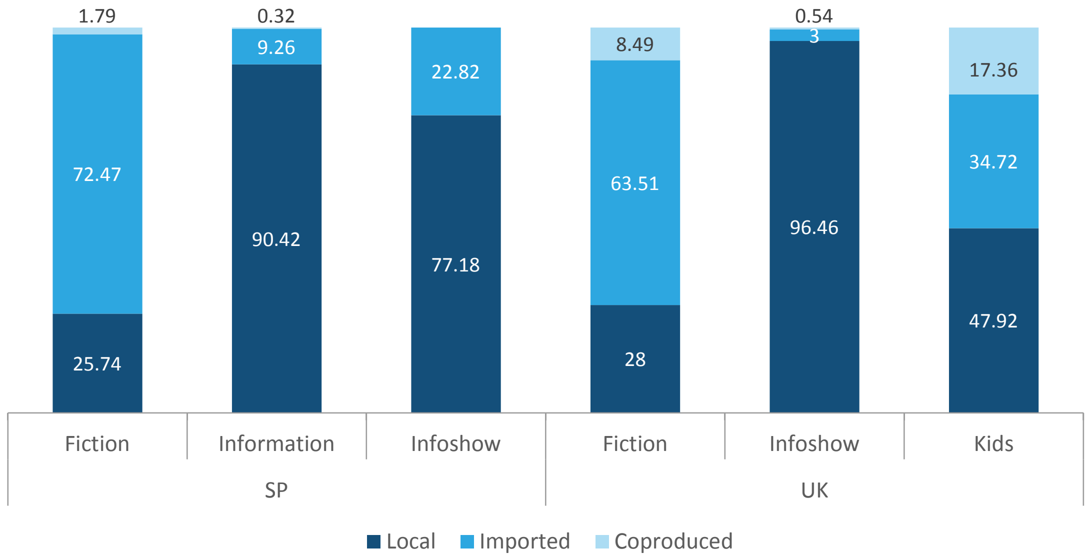
Table 17 - Schedules by type of productions separated by macrogenre and country. Season 2014-2015

		Fiction	Information	Infoshow	Show	Game Contest	Sports	Children	Youth	Educational	Religious	Others
SP	**Local**	8.03	57.85	15.05	7.10	6.09	2.55		0.15	1.14	0.66	1.38
	Imported	68.56	17.95	13.49								
	Co-produced	61.11	22.22							16.67		
UK	**Local**	8.63	32.85	34.61	1.32	10.63	6.26	3.15			0.11	2.44
	Imported	85.37		4.69				9.94				
	Co-produced	60.37	8.89	4.44				26.30				

Whereas some of these macrogenres are strongly linked to local productions, in others the presence of imports and, to a lesser extent, co-productions is significant. During the sample week there are four categories that contain imported content: Fiction, Information, Infoshow and Children, the first three corresponding to the macrogenres most present in the schedules. In contrast, Show, Game Contest, Sports, Youth, Religious and Others broadcast entirely local productions in both markets. In the case of Educational content, which is only aired in the Spanish market, 88.24% is local and 11.76% co-produced.

Fiction programmes fill the majority of time dedicated to imported content in both markets (Table 17). In the UK, this macrogenre fills 85.37% of the time, leaving only 9.94% of the imports time to Children and 4.69% to Infoshow. In the case of Spain, the time of imported content is distributed more evenly despite the level of Fiction being a high 68.56%. Imported Information represents 17.95% and Infoshow 13.49%.

Chart 7 - Macrogenres with imported content separated by countries. Season 2014-2015



In addition to being the macrogenre most imported in terms of volume, Fiction is also the macrogenre with the highest proportion of imports, filling more than half of the time dedicated to this category in both markets, as can be seen in Chart 7. However, in the UK Fiction imports are nearly 10 points less than in Spain on the whole because of the high percentage of co-productions (8.49%) when compared with Spain (1.79%).

Infoshow is the other category with imported programmes in both markets. This macrogenre is more prominent in the UK (28.19%) than in Spain (14.56%), but the percentage of imports is notably higher in the latter country (22.82%) than in the British market (3%). The dominance of local Infoshows, largely in the UK, can be partly explained by the trend starting in the late 1990s and the beginning of the 21st century of the localisation of international formats (Chalaby, 2016b; Moran, 2009a), predominantly of Infoshow programmes such as Reality Games or Reality Shows, which appeal more to local audiences than acquired canned Infoshow content. In addition, the high percentage of local Infoshow in the UK is also explained by the position of the British market as the worldwide leader exporter of television formats (Chalaby, 2015).

In the sample week there are local versions of *The Voice* (SP: *La Voz,* Telecinco, 2012-present; UK: *The Voice UK*, BBC One, 2012-present), *MasterChef* (UK: BBC One, 1990-2001 and 2005-present), *Big Brother* (SP: *Gran Hermano*, Telecinco, 2000-present), *Coach trip* (UK: Channel 4, 2006-2009 and 2012-present), *Come dine with me* (UK: Channel 4, 2005-present) and *Married at first sight* (SP: *Casados a primera vista*, Antena 3, 2015-present).

Information is the other main macrogenre in European schedules. It is clearly the main macrogenre in the Spanish market representing almost half of the programming time

(47.77%), 9.26% of which is acquired from foreign markets and 0.32% is dedicated to co-productions. Due to the characteristics of the content, most of the genres within this category are entirely composed of local productions such as News and Magazine programmes. The only genre with imports is Documentary and only in the Spanish market with 74.96% of the genre. In the UK, where Information fills 26.11% of the schedules, Information content has local content (98.84%) and a few co-productions (1.16%) in the Report genre.

The last macrogenre with imports is Children, which is only present in the British schedules. While there are thematic free-to-air channels dedicated to Children's content in the UK market, the presence of this macrogenre is still remarkable on the generalist channels (5.16%). This is promoted by Ofcom since it considers that the presence of programmes aimed at children on these channels to be important enough to guarantee a high level of public service (Ofcom, 2008, 2015a). Imports are allocated 34.72% of the macrogenre while co-productions have a noteworthy 17.36%.

Table 18 - Schedules by slots separated by type of production and country. Season 2014-2015

	SP			UK		
	Local	**Imported**	**Co-produced**	**Local**	**Imported**	**Co-produced**
Morning	81.84	17.84	0.32	76.62	19.46	3.92
Midday	88.50	11.50		82.96	17.04	
Afternoon	57.26	42.74		75.91	22.73	1.36
Evening	65.63	33.27	1.10	95.92	0.98	3.10
Prime Time	84.37	13.92	1.71	86.38	10.19	3.43
Night	64.61	33.76	1.63	65.36	25.10	9.54

Imported content is also not distributed equally among the different time slots. In the Spanish market, the slot with the highest proportion of foreign acquisitions is the Afternoon with 42.74%. Season 2014-2015 had a specific peculiarity in this slot in that the main channel of the public corporation, La1, was not broadcasting any of its usual Afternoon local Serials, as will be analysed. Instead, La1 broadcast TV Movies, a genre exclusively imported in the market. The Night and Evening slots also have a significant 33.76% and 33.27% of time filled with Imports.

On the other hand, the slots with the lowest percentage of imports in Spain are Midday (11.50%) and Prime Time (13.92%), which are characterised as having high levels of the Information macrogenre, specifically the News genre (37.54% and 31.60% in each slot), a category with only local productions. The large quantity of News programmes is due to two characteristics of the Spanish television market.

Firstly, News programmes have been lengthening in order to insert a commercial break during the broadcast and due to increased ratings, which has become fundamental to the overall success of Spanish channels. Secondly, the main programme of Prime Time is started within the last minutes of the slot to extend Prime Time for marketing reasons. That is to say, if a programme lasts until midnight it can be considered entirely Prime Time and this allows channels to charge more for advertising. While it works from a marketing point of view, in this analysis Prime Time only runs until 10:30pm. After that it becomes the Night slot since the volume of viewers starts to decrease.

In the case of the UK, in general the proportions of imported content in each slot are lower than in Spain, highlighting its lesser dependency on the international market. The slot with the highest proportion of imports is Night with 25.10% of the time followed by the Afternoon with 22.73%. In contrast, the Evening slot only has 0.98% of imports and is mainly filled by Information (43.34%) with News as the predominant genre.

Prime Time is the second slot in the UK with the lowest level of imports at 10.19%. Notably, despite this low proportion, Fiction is the macrogenre most accounted for in Prime Time with 33.61%. However, while on average imported Fiction is 63.51% of the macrogenre across the entire day, this percentage is only 31.38% of Prime Time Fiction, showing the strategic role local Fiction plays in this slot.

Table 19 - Schedules by slots separated by macrogenre and country. Season 2014-2015

		Fiction	Information	Infoshow	Show	Game Contest	Sports	Children	Youth	Educational	Religious	Others
SP	**Morning**	7.24	59.69	14.37	8.63	3.18	0.58			2.68	1.37	2.26
	Midday	11.41	65.94	10.98	2.44	3.66	3.57		0.87			1.13
	Afternoon	44.07	36.74	8.11	6.66	3.63			0.13			0.66
	Evening	38.16	36.36	11.91		9.64	3.93					
	Prime Time	18.02	53.54	14.18	2.22	9.22	2.82					
	Night	42.22	20.94	27.39	5.22	0.95	3.28					
UK	**Morning**	13.17	31.60	25.98		5.68	3.57	17.53				2.47
	Midday	20.14	25.27	42.98	0.58	5.52	2.90	1.06				1.55
	Afternoon	32.02	16.98	25.60	0.63	18.60	5.80				0.37	
	Evening	19.90	43.34	23.53	3.92	2.94	6.37					
	Prime Time	33.61	28	28.95	0.48	6.48	2.48					
	Night	35.50	19.75	20.71	3.34	3.24	9.83					7.63

The level of each type of production is also influenced by the scheduling strategies and trends behind weekdays and weekends due to their specific programming strategies (Eastman & Ferguson, 2006). In both cases, local content dominates but the proportions are distributed differently across the three production typologies as can be seen in Table 20.

Table 20 - Schedules by weekdays and weekend separated by type of production and country. Season 2014-2015

	SP			UK		
	Local	**Imported**	**Co-produced**	**Local**	**Imported**	**Co-produced**
Weekdays	77.31	22.19	0.50	83.95	14.18	1.87
Weekend	68.13	30.74	1.13	65.06	27.68	7.26

The changes in each production category from weekdays to weekends are less pronounced in Spain than in the UK. In the southern European country, imported content represents 22.19% of the time during the weekdays and increases 8 points during the weekend while local productions are reduced from 77.31% to 68.13%.

The major difference between Spanish schedules from weekdays to weekends is the decrease in Information content (weekdays, 52.56%; weekend, 35.83%). The other two main macrogenres, Fiction and Infoshow, do not significantly change with only a small increase in both cases. This is especially significant in the case of Fiction since it is the macrogenre with the most imported content and only increases from 22.64% on weekdays to 24.99% at the weekend. However, the proportion of imported Fiction programmes significantly increases on Saturdays and Sundays. While from Monday to Friday imports equate to 64.29% of the macrogenre, during the weekend this percentage rises to 90.98% of the time.

In the case of the UK schedules, the drop in local productions during the weekend is more drastic losing 18 points (weekdays, 83.95%; weekend, 65.06%). At the same time, imported content increases from 14.18% to 27.68% and co-productions also rise from 1.87% on weekdays to 7.26% during the weekend. A major change in the scheduling is also connected to the Information macrogenre (weekdays, 30.51%; weekend, 15.06%). In addition, Infoshow also reduces on Saturdays and Sundays with 21.39% of the scheduling time, while during weekdays this rises to 30.90%.

Fiction is the only one of the three main macrogenres that increases its presence, by 10 points, during the weekend (weekdays, 21.28%; weekend, 31.62%). The proportion of imported Fiction, as happened in Spain, also increases in the British market during

Saturdays and Sundays. However, this is less so than in the Spain, rising from 60.16% during the weekdays to 69.19% at the weekend.

The differences in the changes of the Fiction macrogenre between weekdays and the weekend and also between countries are explained by the genres scheduled. While on weekdays Serialised Fiction dominates in both markets (SP, 71.54%; UK, 76.22% of Fiction time), during the weekend Feature Films and TV Movies overtake the Serialised genres (SP, 84.62%; UK, 59.80%).

These results confirm the standard scheduling practices used by generalist channels. During weekdays most programmes, except those in Prime Time and Night, are scheduled by *striping* or horizontal programming while during the weekend more stand-alone programmes are aired (Castelló, 2005; Contreras & Palacio, 2001; Eastman & Ferguson, 2006). Furthermore, the amount of viewers is higher during weekdays resulting in most local content being programmed during those days. Nevertheless, in the UK some local Series and Serials are present during the weekend while in Spain these are exclusively scheduled for weekdays.

In the British market, Children’s content also climbs at the weekend from 3.44% to 9.48%. This increase is explained because while from Monday to Friday only Channel 5 airs this category, on weekends it is also scheduled on ITV1. On weekdays, imported programmes are 12.82% of the time dedicated to the macrogenre but this figure more than quadruples to 54.67% on Saturdays and Sundays despite the most dominant genre in both cases being Cartoons.

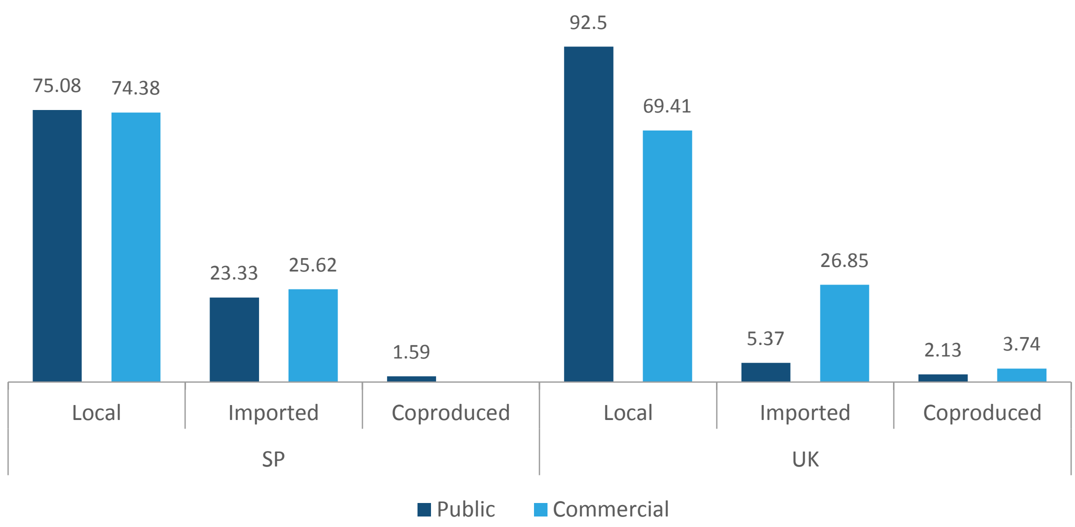
Table 21 – Schedules by weekdays and weekend separated by macrogenre and country. Season 2014-2015

		Fiction	**Information**	**Infoshow**	**Show**	**Game Contest**	**Sports**	**Children**	**Youth**	**Educational**	**Religious**	**Others**
SP	**Weekdays**	22.64	52.56	14.26	2.65	4.79	0.93			1.03	0.08	1.06
	Weekend	24.99	35.83	15.30	11.92	3.94	4.35		0.40	0.79	1.52	0.96
UK	**Weekdays**	21.28	30.51	30.90	0.62	10.58	1.68	3.44				0.99
	Weekend	31.62	15.06	21.39	2.08	2.75	13.06	9.48			0.31	4.25

6.1. Differences between public and commercial channels

Before delving into the analysis of the acquisition process, the main differences between the presence of imported content on the public and commercial channels of our sample will be highlighted. As can be seen in Chart 8, public channels have a lower proportion of imports than the commercial channels with this contrast being especially significant in the UK where the public broadcaster only fills 5.37% of its scheduling time with imports. Specifically, the level of imported productions on BBC One is 2.01% while on BBC Two they slightly increase to 7.68%. These low results stress the role the BBC is seen to have as promoter of British productions.

Chart 8 - Schedules by types of production separated by country and ownership. Season 2014-2015

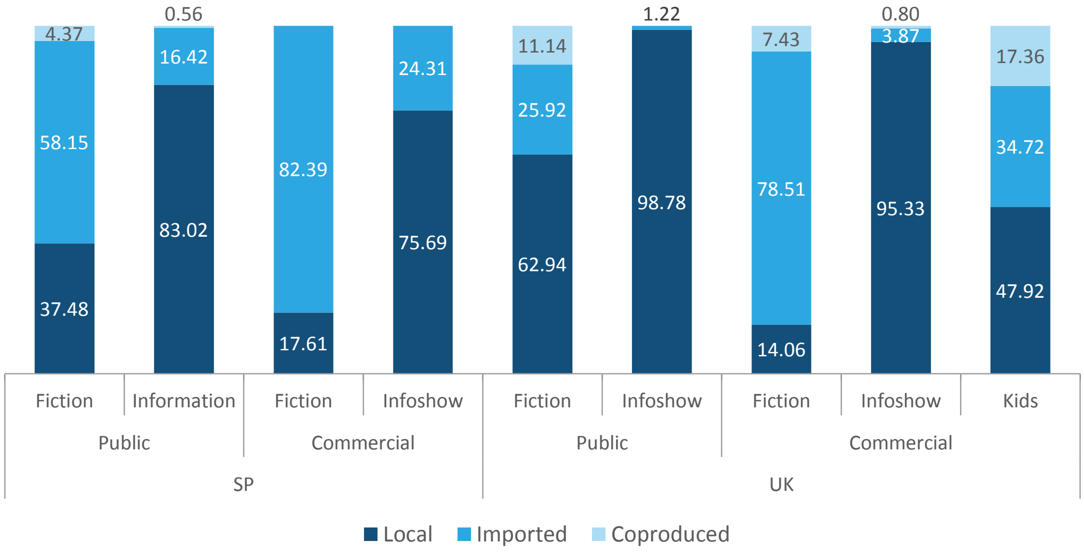


In Spain, the differences between the two types of ownership are significantly less pronounced. Furthermore, on the secondary channel of the Spanish public corporation, La2, imported content surpasses the commercial channels average by 13.89 points with 39.51%. In contrast, La1 only assigns 20.57% of its schedule to imports while TV3, the Catalan channel, is the public broadcaster with the lowest level of acquisitions at 10.03%.

As previously observed, the main channels of the BBC have higher obligations regarding the original programming quotas than the rest of the general-interest channels in their market. In contrast, the Spanish public corporations do not have a higher quota than that established for all the other generalist channels, conforming to the minimum European works quota (AVMS Directive), with some language exceptions. While this difference cannot be the only reason for the dissimilarities between the two public corporations regarding the quantities of local productions, the lower level of Spanish productions on RTVE is supported by the lower expectations of its quota.

Regarding the commercial channels, it is important to highlight that British broadcasters have a slightly higher level of imports (26.85%) than Spanish (25.62%). This shows that the greater average in the Spanish market is due to the public channels having an overall higher dependency on acquired content in the market.

Chart 9 - Macrogenres with imported content separated by country and ownership. Season 2014-2015



The most significant difference when comparing the types of productions within each macrogenre between public and commercial channels, in both markets, is the Fiction category (Chart 9). Imported Fiction is more predominant in the commercial channels while the public ones choose more local content and co-productions. At the same time, Infoshow acquisitions are more prominent in the commercial channels in both markets. However, it has to be remarked that while Spanish public channels do not opt for this macrogenre, on the BBC it plays a prominent role.

Regarding the presence of imported Information in the Spanish market, it falls entirely in the schedules of the public channels (La2 and TV3). Lastly, Children's imports are found on British commercial channels since they are aired on ITV1 and Channel 5.

These results have shown that the dependency on the international television market is higher in the Spanish market than in the UK. This difference is mainly accentuated by the significant quantities of imported programmes on the Spanish public channels. Furthermore, imported productions are concentrated more in certain parts of the schedules regarding macrogenres, slots and day of the week. In both cases, the most acquired macrogenre is Fiction. To a lesser degree, Infoshow is also purchased in foreign countries by Spain and the UK while Information, specifically Documentary, are only imported by Spanish public broadcasters and Children's content by British commercial corporations. With respect to the slots, imported productions tend to be more prevalent in low competitive parts of the day. However, in Spain there are significant numbers in the highly important Night slot. Lastly, acquisitions are more prominent at the weekend than during weekdays.

7. THE ACQUISITION PROCESS OF LOCAL BROADCASTERS

The process of buying canned television content from another country is complex. Firstly, the goods acquired are not just economic but also cultural. In addition, channels do not purchase a tangible item but the rights over an intellectual property. Secondly, every negotiation is different and involves different players. Lastly, the context of the local market and the transnational relationships and trends are two different forces that simultaneously influence the acquisition process.

Despite the variations within each market and even each process, a general common established routine when acquiring international television content can be outlined from the analysis of the sample, with no differences between countries or types of ownership. Therefore, the general steps of the acquisition process will be presented which are followed by all the channels when imported content is purchased.

In general terms, the acquisition process can be divided into two main phases: the selection of content and the negotiation with distributors. In the first, Acquisitions Executives decide which programme or programmes to buy to fill their schedules with. This decision always has to be adapted to the necessities of the channel and executives take several factors under consideration when finding suitable content to purchase.

The principle factors influencing the local executives and their companies have been divided between internal and glocal with the former including internal aspects of the corporations not shareable among the other channels. On the other hand, glocal factors are the trends and habits that combine the characteristics of the transnational and the local television markets. In addition, international television fairs such as LA Screenings or MIPCOM still play a role in the decisions taken by local broadcasters.

The second step of the acquisition process is the negotiations between broadcasters and distributors. At this point, both parts are concerned with the size of the deal (from a single stand alone programme to a multi-annual agreement) and the specific terms of the negotiations referring to the conditions of the television window, including the length of the license period, the position of the window in the overall windowing process of the programme, the exclusivity or holdback, the number of runs and the rights acquired. Finally, the price will be partly determined by all these previous factors, in addition to the number of competitors desiring the same content and the strength of the local broadcaster in the transnational value chain.

Figures 4 and 5 display the steps followed by all broadcasters when acquiring imported content separated by the selection and negotiation phases. A detailed analysis of these two sub-processes will be presented in the two following chapters remarking not only on the general trends but also the specific aspects of the two countries and highlighting the major characteristics of each channel.

But first, this chapter will present a general introduction to the whole acquisition process by analysing the organisational charts of the acquisitions departments to set the context of where the process takes place in the sample corporations. In addition, the relationships between the Departments of Acquisitions and Scheduling will be commented on as a key factor when adjusting imported programmes into the schedules.

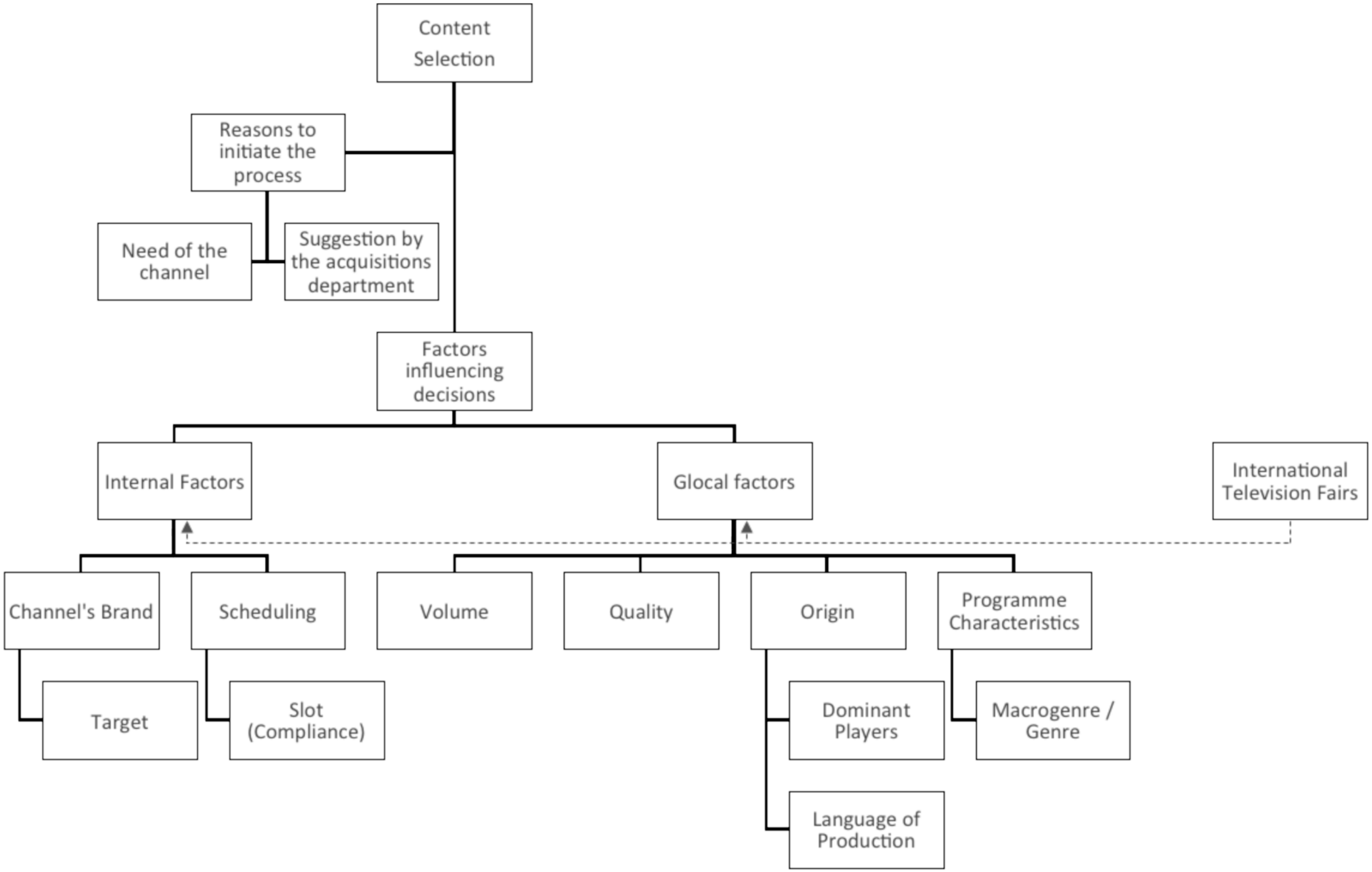


Figure 4 - Content selection, first stage of the acquisition process
Source: author.

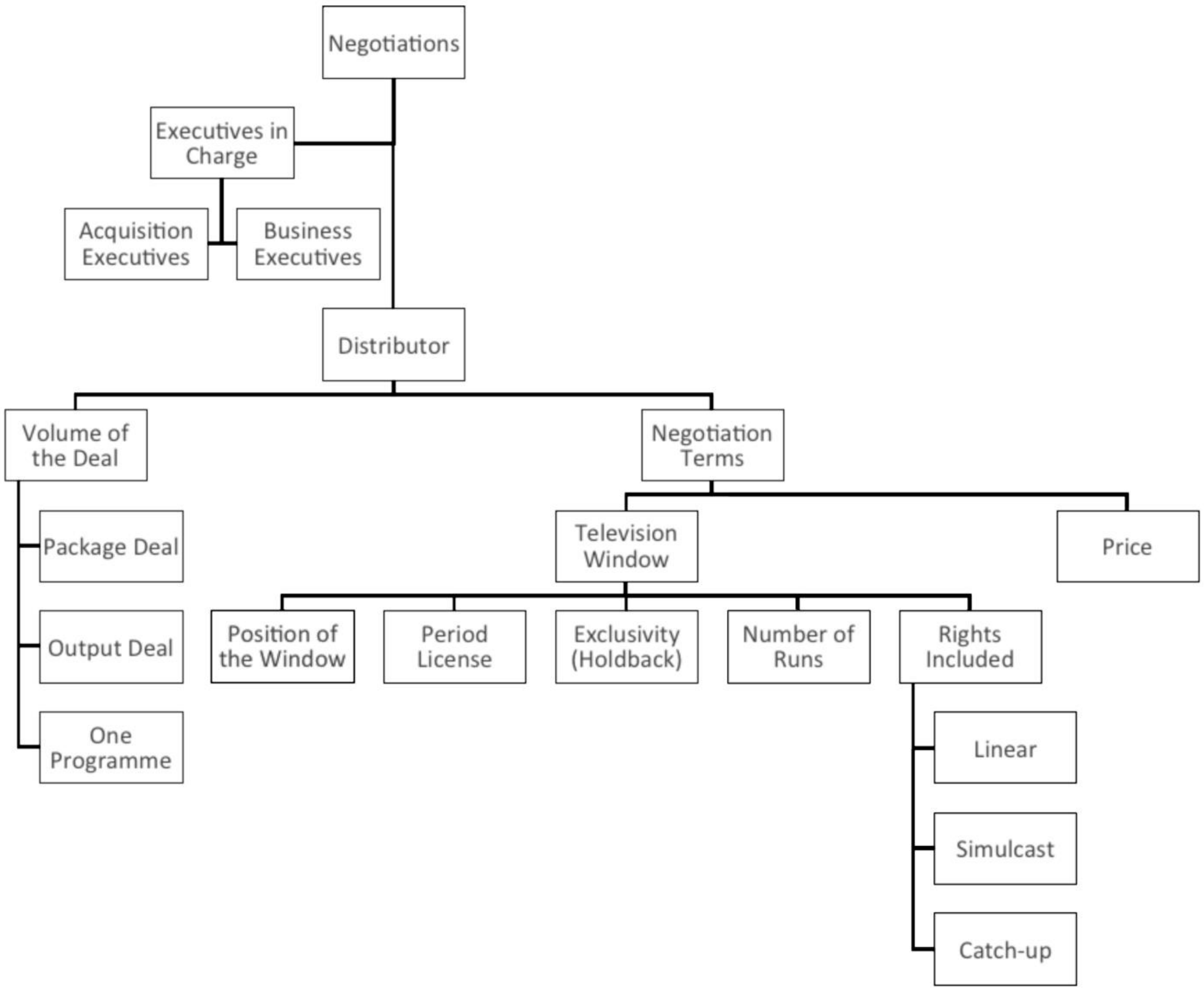


Figure 5 - Negotiations with distributors, second stage of the acquisition process
Source: author.

7.1. The Department of Acquisitions

In order to have a deeper understanding of the role of the acquisitions department and its executives, who act as cultural intermediaries, it is essential to know how they are structured in our sample corporations. As will be presented, the different compositions reflect the necessities of each company and the role acquisitions play in them.

While our focus is on the general-interest channels, these departments are in charge of all the channels of their corporation, including portfolio channels. Thus, the number of generalist and portfolio channels of each corporation as well as their position in the market influence the organisational charts and roles of the executives ability to fulfil the specific necessities of all channels.

In the following sections, the organisational chart of each corporation will be presented.

7.1.1. Organisational Charts

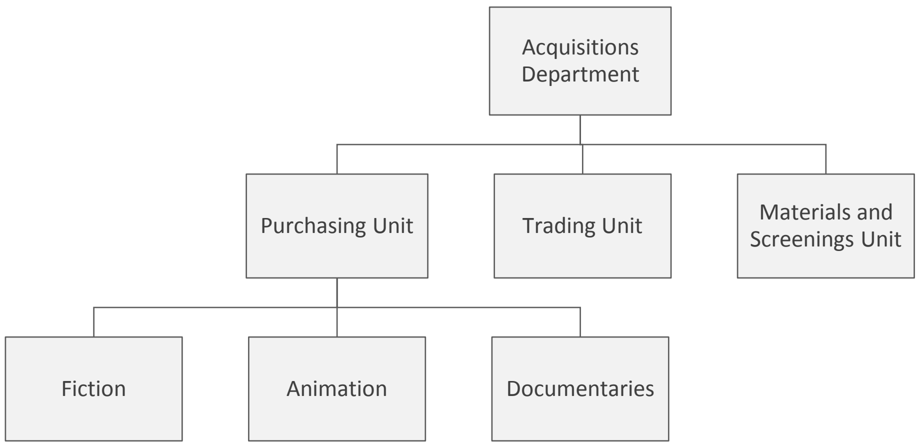


Figure 6 - RTVE organisational chart

In Radio Televisión Española (RTVE) acquisitions is a specific department in charge of the entire acquisition process. Nevertheless, it has a close relationship with the scheduling department and the directors of the different channels, an aspect considered essential for the efficient fulfilment of their purposes.

The role of the acquisitions department is accomplished by the combination of three different units. The Purchasing Unit is in charge of selecting and choosing the programmes that are going to be acquired, the Trading Unit negotiates with the distributors and, lastly, the Materials and Screenings Unit ensures the titles are ready to be broadcast. For example, they dub programmes when necessary or add subtitles to parts of a programme.

The Spanish public corporation, as commented previously, is suffering constant changes due to governmental interference. This is temporarily affecting the functioning and usual structure of its acquisitions department. Usually there is a head of the department for the coordination of the three different units that conform Acquisitions. However, in August 2015 the director of the department was dismissed from the corporation due to disagreements with the management. According to the newspaper *El Mundo*, the Head of Acquisitions may have been released due to the purchase of 594 Spanish Feature Films at an estimated cost of 9 million Euros to be broadcast in all the Prime Time slots of La2. Another possible reason was the aim of broadcasting European Feature Films rather than US Films in the Afternoon slot of the main channel, La1. Because of this situation, the Fiction Executive is temporarily acting as Head of Department until a new Acquisitions Director is announced. This dismissal was not an isolated case since several directors of other RTVE departments were released or resigned in the same television season (Fernández, 2015).

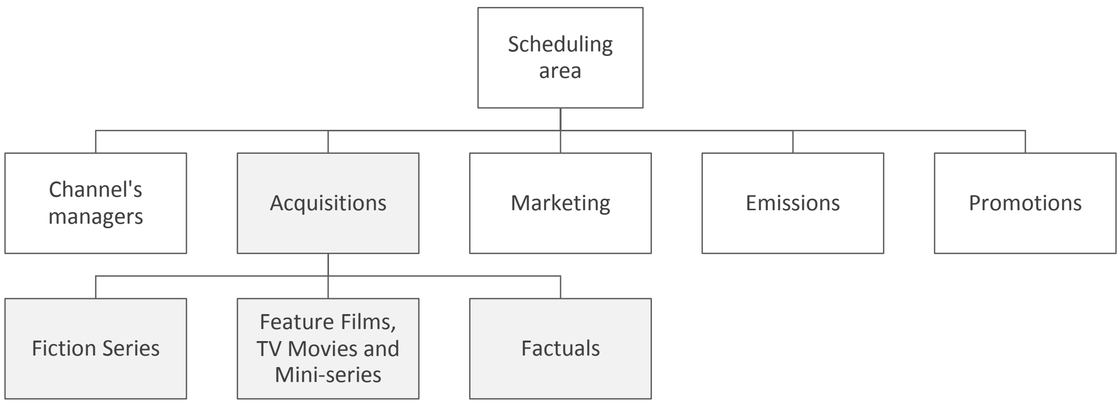


Figure 7 - Mediaset organisational chart

At Mediaset, the acquisitions department is part of a large area under the heading of Scheduling. The specific unit of acquisitions is in charge of selecting all the imported content that will be aired through all the channels of the corporation and the Head of the Department is in charge of all the genres purchased. At a second level there are senior

executives that are specialised in Fiction Series, Non-Serialised Fiction and Mini-Series and lastly, Factuals. In addition, there are junior workers that work across these sections.
This department is only in charge of selecting the products while a separate buying department deals directly with international distributors.

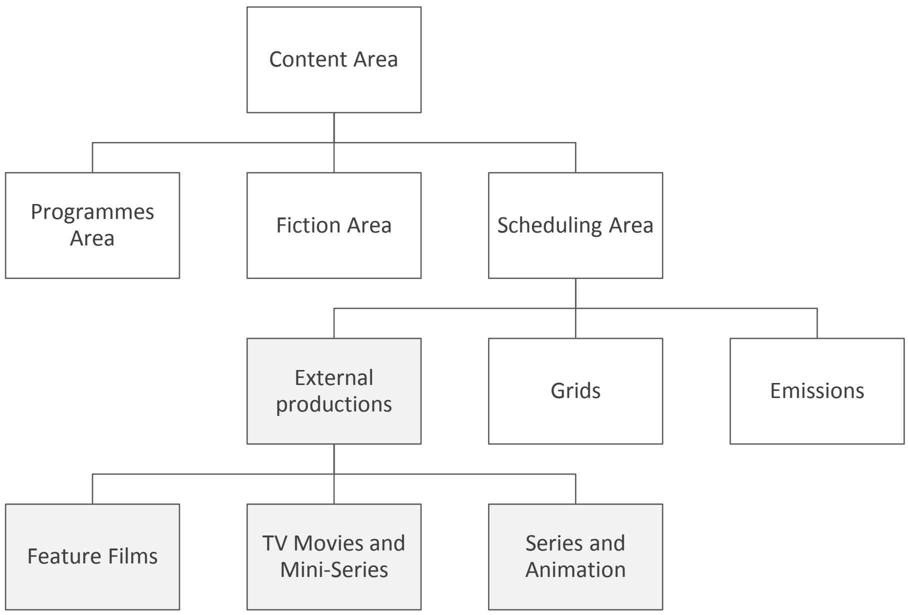


Figure 8 - Atresmedia organisational chart

In Atresmedia, Acquisitions Executives are part of the content area. The director of this area is responsible for three different units: the Programmes Unit for Non-Fiction commissions; the Fiction Department for local productions; and the Scheduling Area. The Vice Director of Content is in charge of the latter unit, which has three different roles: transmissions, composing the schedule grill and acquisitions.
Thus, in this case the executives who have responsibility for selecting imported programmes are part of the scheduling department, which at the same time is part of the Content Area. In the Department of Acquisitions there are six executives divided according to the Fiction genre they are seeking. There is one in charge of Feature Films, two for TV Movies and Mini-Series, which reflects the importance of TV Movies for the corporation especially on the main channel, Antena 3, and three for Series, Serials and Animation.

The Acquisitions Unit only selects the programmes and the Purchasing department negotiates the agreements with the distributors. As with Mediaset, this department belongs to another entirely different branch and is not part of the content area.

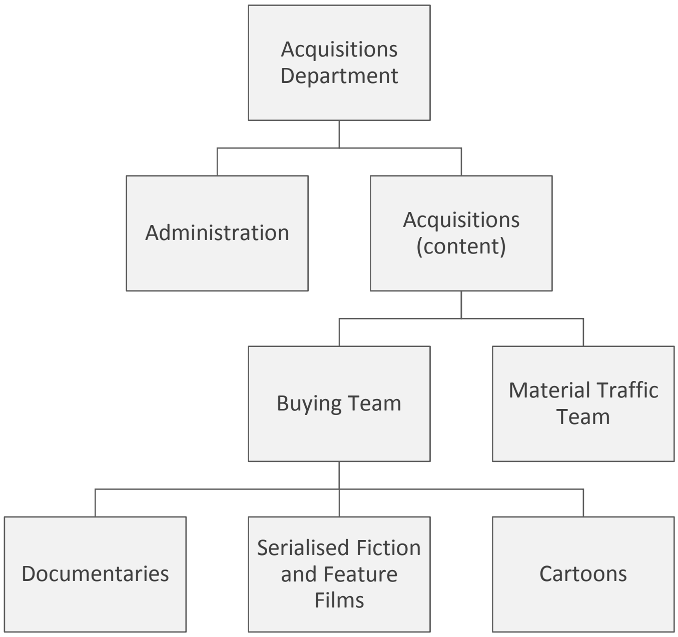


Figure 9 - CCMA organisational chart

The acquisitions department of CCMA, the public Catalan corporation, as with RTVE, is solely in charge of the whole acquisition process. It has two branches: one administrative and one of content. The Content Unit is formed by the Buying Team, in charge of viewing and selecting material and the Material Traffic Team, which prepare the material purchased for broadcast. In this case, this is particularly important since they are in charge of dubbing the content into Catalan because most programmes are not in this language when acquired by the corporation. On the other hand, the Administrative branch is in charge of all negotiations with distributors.

The Buying Team executives are concerned especially with five main genres: Documentaries, Series, Serials, Feature Films and also Cartoons (CCMA has a channel exclusively for children's content, Super3).

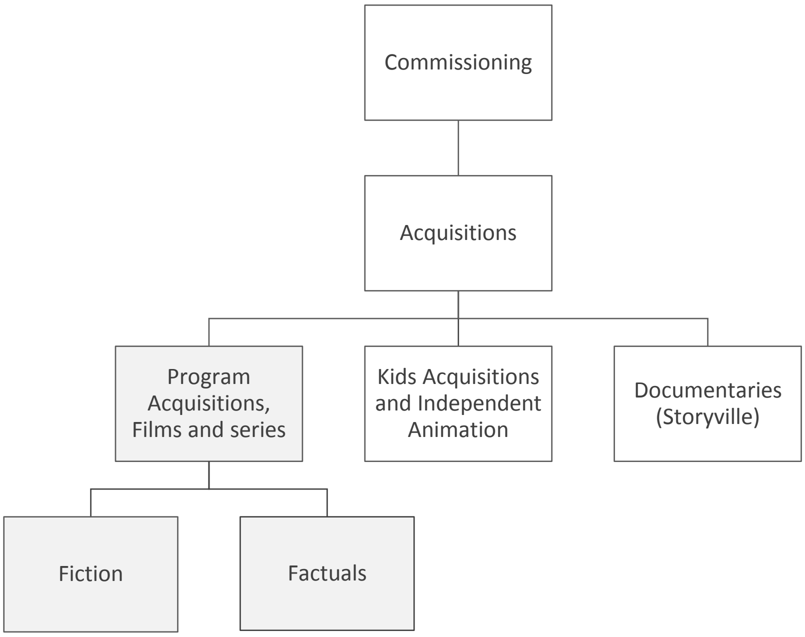


Figure 10 - BBC organisational chart[24]

Moving on to the British corporations, at the BBC acquisitions are part of the commissioning area which is in charge of deciding which programmes to order and produce. The Department of Acquisitions is divided into three different areas: Program Acquisitions, Films and Series Unit, Children's Acquisitions and Independent Animation Unit and the unit known as Storyville.

The first area is the most alike to the other channels since it is responsible for acquiring programmes and Fiction. The second section is entirely dedicated to Children's content and independent Animation, not only acquiring but also commissioning them. Lastly, there is another section dedicated to Documentaries with two editors who are in charge of commissioning and acquiring local and imported titles. The importance of this genre to the corporation, as will be seen, is made obvious by this chart since there is an entire section, Storyville, dedicated exclusively to Documentaries.

[24] It was not possible to directly ask the corporation about its structure of its acquisitions department therefore this chart has been made with the information displayed on their website.

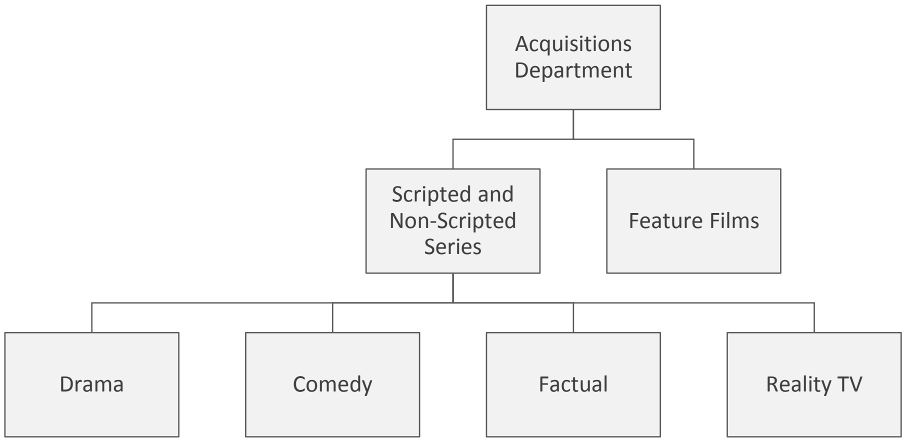


Figure 11 - ITV organisational chart

ITV has a small team for Acquisitions composed of only three executives: the Head of Scripted and Non-scripted Series, the Head of Feature films and a senior executive that works across these two sections. Furthermore, this role helps to acquire Children's content, which is purchased directly by the Channel Manager of Citv, the channel of the corporation aimed exclusively at children.

This latter position was introduced in 2016 due to the overwhelming amount of work within the department. However, the directors of the company did not allow the number of people working exclusively on acquisitions to increase. Because of this, an Acquisitions Assistant was exchanged for a more senior role to help with selecting content and negotiating with the distributors.

Another important aspect to highlight on this acquisition chart is the role of the Head of Scripted and Non-scripted Series since she acquires Fiction as well as Infoshow content. This differs from the other corporations where executives specialize on a specific macrogenre or even a specific genre. The three ITV executives deal directly with the distributors but they have the assistance of the Business Advice Team. Notwithstanding, this team belongs to a distinct department.

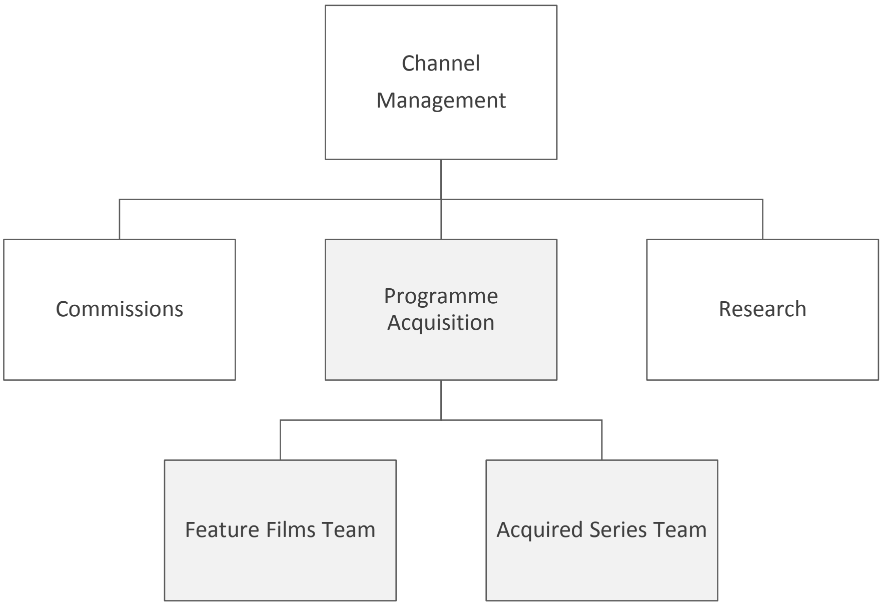


Figure 12 - Channel 4 organisational chart

The Acquisitions Department at the Channel 4 Corporation is situated inside the channels Management Department, where the schedule and needs of the channels are decided. This corporation does not have a head of the Acquisitions department, as happened at ITV. On the contrary, it has two separate teams: Feature Films and Acquired Series which have their own business affairs and finance people who work across them and assist in negotiating with the distributors. Those who work in the two teams, two in each, have distinct titles but in both cases one position has more seniority than the other.

While the Acquisitions Department is entirely dedicated to Fiction, Channel 4 has a team looking for local and imported Documentaries, these executives working for a different unit from the management department of the channel. Regarding Factual Entertainment, despite there being imported programmes of this genre, according to the information given by the executive interviewed there is no one in the acquisitions team looking specifically for this content.

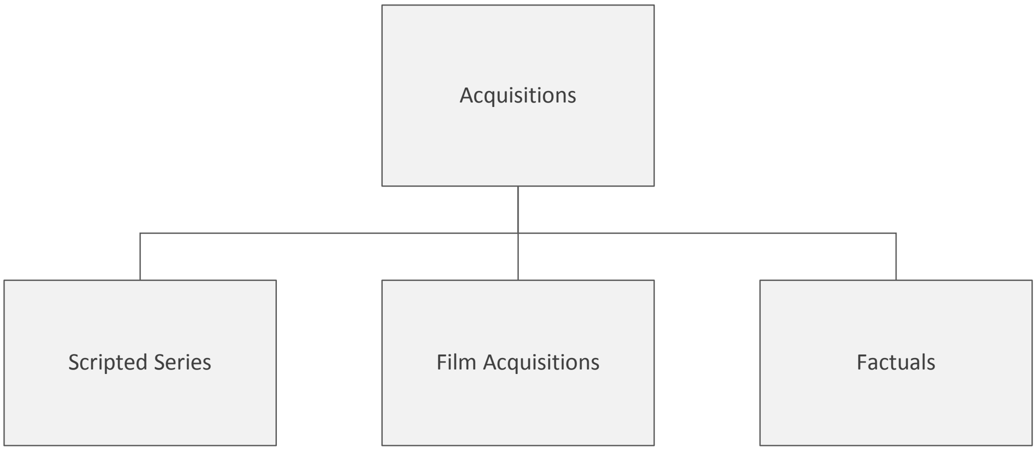


Figure 13 - CHANNEL 5 organisational chart

Lastly, the case of the Channel 5 Corporation has to be viewed while considering the importance that acquisitions have on the portfolio channels as well as on the general-interest channel of the corporation. Furthermore, as indicated by the executive, this small acquisitions team will also support the Viacom channels in the UK[25].
Regarding the departmental structure, there is the Head of Acquisitions which supervises all the actions, followed by three managers responsible for different genres: Scripted Series, Feature Films acquisitions and lastly Factual Entertainment (Docuseries, Docusoaps and Docucomedies).

Acquisitions is a department of its own, however, some of the executives on the team also have roles in a different area of the corporation. The two first managers, scripted Series and Feature Films, are also Channel Managers, that is to say, they are each in charge of one of the portfolio channels. They have control of the editorial line while another manager is responsible for the scheduling strategy. Therefore, even though there are separate departments there is a close working relationship with the managers of the channels who decide the schedule roles, in some cases being executed by the same person.

[25] Viacom bought Channel 5 on May 1, 2014.

7.1.2. The roles of Acquisitions Executives

As can be observed, each of the departments organisations reflects the necessities of each corporation resulting in most being built around Fiction, the most imported macrogenre. The other category which is important in several corporations is Factuals, highlighting the increasing importance of these programmes in European schedules. Mediaset, ITV and Channel 5 have executives looking for this type of content. In addition, the public companies and Channel 4 have executives exclusively in charge of Documentaries. In the British case, the same executives are responsible of commissions and acquisitions.

Concerning the tasks that Acquisitions Executives undertake, there is a significant difference between Spain and the UK. While in the latter the same executive who chooses the programmes is in charge of the negotiations with the distributors, sometimes together with business negotiators, Spanish executives do not actively participate in the negotiation of the agreements. For example, even though the acquisitions departments at RTVE and CCMA supervise the entire process, the people running the negotiations are different from those selecting the content. In the case of the Spanish commercial corporations, the negotiating teams belong to a completely different department.

This distinction is important since it highlights the different levels of professionalism between the Spanish and British executives. The UK has been working as a competitive market since 1955 with the start of ITV1. In addition, it has a broad variety of pay-TV channels and platforms. Contrarily, in Spain the public monopoly was not broken until 1990 and pay-TV is still growing. Furthermore, this idea is supported by the knowledge that the media system in the UK is more professionalised than in Spain, as established in the classification of Hallin and Manchini (2004).

7.1.3. The Relationship with the scheduling department

Despite a proportion of the departments being part of the scheduling area and others being an external unit, the communication between these two areas is always essential to coordinate the buying of imported programmes. As an example, RTVE expresses that a good working relationship between the scheduling and acquisitions departments is essential for making decisions based on economic viability. Due to the politicisation of the Spanish public broadcasting corporation, changes of directives and the organisational chart are frequent resulting in non-productive outcomes: "many times we have gone our separate ways and obviously I cannot buy something that the person in charge of scheduling later watches and says he cannot fit anywhere" (MÁ. Morales, RTVE, January 22, 2016). CCMA also stresses the economic impracticality of the two departments working separately, at has happened in the corporation in the past.

The communication between the two areas is maintained across all the acquisition process but it is essential at the beginning to establish the basics for the selection of a particular programme, as commented by the executives. Furthermore, the initiative to acquire imported content can originate in either of the two areas: Scheduling or Acquisitions. A channel may require the acquisitions department to fill a need in the schedule. Alternatively, the acquisition department sources a product in the international market that suits a channel and proposes it to the manager or scheduler.

The most common way to initiate the acquisition of a programme or package is the former: there is a specific need to fill a slot in the schedule of a channel and the schedulers request that the acquisitions team acquire an appropriate programme on the international market. The majority of these needs are known far enough ahead giving time to the executives to search for the most suitable content and negotiate a license (MÁ. Morales, RTVE, January 22, 2016; Á. López, Mediaset, June 9, 2015; MC. Dunlop, Channel 5 Corporation, July 6, 2015). This is possible because the Managers or the Schedulers of the channels design the hypothetical schedule for the following year months in advance aiding budget preparation (Havens, 2006).

This initial scheduling plan does not mean that during the course of the television season changes to the schedule and acquisitions are not made. In this case, the Departments of Acquisitions have to fill gaps of the schedules in a very short time. Furthermore, as a consequence of two of the main characteristics of imported programmes being their lower average price and the possibility of immediate scheduling, schedulers use this type of content to replace those programmes, local, imported or co-produced, that are not performing well enough (MÁ. Morales, RTVE, January 22, 2016; J. Iriarte, Atresmedia, April 16, 2016).

Despite most of the communication usually going from the schedulers to the television buyers, in fact communication travels in both directions. In this second case, the acquisitions team, due to their up to date knowledge of the international market, can suggest content that could be interesting for the channel. "I always like to think that if we find something truly exceptional and extraordinary, the channels will find a home for it somewhere!" (S. Deeks, BBC, November 10, 2015).

As an example, Mediaset comments on the case of the Infoshow Docuseries *Dog Whisperer* (National Geographic, US, 2004-2012), which was initially screened by the Acquisitions Executives of Cuatro (prior to the merger with Mediaset) due to a commitment that the corporation had with the distributor. However, they did not have a specific need for a Factual Entertainment programme. After screening it, it was acquired in order to be aired on Cuatro since it was particularly interesting and suitable for that channel. Furthermore, this coincided with the low performance of the weekend Morning slot. After the initial suggestion made by the acquisitions department, the show has been scheduled in that slot since August 2007, also during weekdays.

Finally, the information in this chapter has revealed the standardisation of the process that local broadcasters follow when purchasing content from the international market. Furthermore, these practices are shared across the two countries and also among public and commercial broadcasters. In the first part of the process, Acquisitions Executive search for suitable content and several factors, divided between internals and glocals, influence their decisions. The second stage is focused on the negotiations between the local companies and the international distributors. These processes will be thoroughly analysed in Chapters 8 and 9.

In the second part of this chapter, the organisational charts of the sample corporations has allowed the contextualisation of the work of the Acquisitions Executives within their company. As has been seen, there is no single method of structuring the acquisitions department but they attempt to fulfil the needs of each corporation. However, a major difference between the Spanish and British market has been encountered. While in the UK television buyers deal directly with distributors, in Spain this task is undertaken by Business Executives. This highlights the greater specialisation of the British television buyers. Lastly, communication between the acquisitions and scheduling department is considered essential for the effective selection of imported content.

8. SELECTION OF IMPORTED CONTENT

Many factors influence the decision channels take when choosing an international television programme to be broadcast in their schedules. Furthermore, the digitalisation of the television market has had four main changes impacting on the selection stage. Firstly, it has facilitated the technological resources directly leading to increase in speed of the transnational audiovisual flows. Secondly, it has favoured the emergence of new players in the local television markets, considerably enlarging the amount of foreign television content available for purchase. Thirdly, it has intensified the level of competition in the Spanish and the British markets, reducing the opportunities for traditional generalist channels to secure the imported content they are interested in. Fourthly, the fragmentation of audiences has decreased the market share of broadcasters. In addition, the international economic crisis, more profound in the Spanish market than in the UK, has affected the decisions of television corporations.

As a consequence, while selecting international content still requires a certain degree of intuition by Acquisitions Executives, since the start of the audiovisual digitalisation the decisions have been taken with more objective and quantifiable reasons. Furthermore, the decisions are not usually taken by one single person but involve several executives such as the Schedulers or the managers of each channel. In the cases of high priced content, the directors of the corporation have to agree on the purchase.

The influences under consideration by the corporations have been divided between internal and glocal factors. The first factors include internal aspects of the corporations not shareable among the other channels. By contrast, the glocal factors are the trends and habits that combine the characteristics of the transnational and local television markets.

In this chapter, the main internal and glocal factors will be presented and how each influence the selection of canned imported content will be examined. In addition, international television fairs such as MIPCOM or the LA Screenings will be explored in order to evaluate how they currently influence the decisions of the executives.

8.1. Internal factors

General-interest channels usually aim at a broad audience with diverse programming despite some slots having a specific target (Eastman & Ferguson, 2006; Ellis, 2000a). Overall, these channels position themselves to have a mass appeal. Moreover, each corporation tries to create a distinctive brand image inside its local market to stand out amongst its competitors. Consequently, the programmes scheduled have to fit in the intended image strategy. This does not only affect local commissions but also imported programmes.

We will refer to the considerations concerned with the inward strategies of each channel and corporation as internal factors. The main two internal elements commented on by executives are the brand of the channel and its scheduling, which are highly interconnected.

8.1.1. The Channel's Brand

One of the most mentioned aspects when buying a product is that it has to be appropriate for the channel and the brand. As cultural goods, television programmes convey a specific image and point of view that can be either similar or different to that rendered by the brand of the channel. General-interest channels, despite aiming for a broad audience, have a specific identity to differentiate from their competitors. Executives describe their channels in terms of the type of content broadcast and the specific target aimed at.

Acquisitions Executives constantly assess international content to ensure its suitability for the brand image. Due to the close definition and construction of their brands, all corporations in both countries have stated that they are aware of which channel imported content will be aired on before its purchase. Nevertheless, before the economic crisis it was not uncommon for Spanish corporations to buy an interesting programme and then decide where and when to schedule it (MÁ. Morales, RTVE, January 22, 2016; Á. López, Mediaset, June 9, 2015). This was especially emphasised by the Spanish public corporations.

In rare circumstances programmes have to change the channel that they were initially intended for with two different reasons being given. Firstly, a programme may have the ability to fit in more than one channel. Secondly, if it is not working on the channel, it may be easier for that content to be amortised on another, usually a portfolio channel (Á.

López, Mediaset, June 9, 2015; K. Ames, Channel 4 Corporation, November 25, 2015; J. Iriarte, Atresmedia, April 14, 2016).

8.1.2. Scheduling

The second internal factor of the selection stage is scheduling, closely linked to the channel's brand. The schedule of each broadcaster reflects the image designed for each channel and corporation. In a general sense, the content acquired in the international market has to be aligned with the scheduling strategy of each channel. Thus, the overall programming influences the type of imported content executives select in terms of macrogenres and genres but also the topics of the content (microgenres). At a lower level, the arrangement of the schedules will determine which slots of the grid will be filled with imported programmes due to the specific needs of each slot (Eastman & Ferguson, 2006; Arana, 2011, Palacio & Contreras, 2001).

As previously stated, when corporations acquire the rights to broadcast a programme, they decide beforehand on which channel it will be scheduled. Additionally, some channels usually decide the slot to be used in advance, further confirming the role the programme will have at the corporation. This happens independently of the country or the type of ownership of the channel. The purpose behind deciding in advance where a programme is going to be scheduled is due to the characteristics of the programming logics of general-interest channels.

The corporations who decide the specific slot in advance before acquiring programmes are RTVE, CCMA, the BBC and Channel 5. "Here we do not buy anything that scheduling does not want" (C. Blanch, CCMA, May 18, 2015). In the case of the BBC, it is noticeable that since they have very few slots for acquisitions, they always have to know which one it will be aired on. At Channel 5 Corporation, even when the acquisitions department suggests content that could be interesting to the channel, it will be discussed with the Head of Scheduling and if approved, a suitable slot will be decided beforehand. Therefore, they do not buy programmes to keep in stock and later allocate.

However, an exception had to be made with the launch of the portfolio channel Spike by the Channel 5 Corporation. There was insufficient time to decide the complete schedule and acquire the programmes afterwards. As a consequence, a significant number of programmes were acquired and the schedule was formed later. This was a clear exception since being the company with the smallest budget in its market, not only do they have to be very cautious with their acquisitions, but also their commissions.

Mediaset, Atresmedia and Channel 4 have also increased the scheduling details of their acquisitions before purchase in recent years. Nevertheless, it is not an obligation for them to have already decided a particular slot in order to buy a piece of content. Regarding ITV, this corporation has a more balanced position and despite not usually knowing in which specific slot a programme will be aired, it is always known if it is going to be aired in Day Time or Prime Time, “because you are looking for sort of things like compliance issues, so if you are buying something for daytime you need to be pretty confident that it’s not going to have lots of issues in terms of violence, nudity, you know undue prominence…” (S. Breslau, ITV, September 16, 2015).

The authorities have established rules concerning the content that can be aired during the different slots of the day and channels have to follow rules of compliance in order to protect viewers, especially children. Thus, some programmes are only able to be scheduled in Prime Time or Night slots and are not suitable for broadcast during the day.

In the UK, Ofcom is responsible for establishing the rules and ensuring that they are being followed by investigating complaints raised by viewers. In the Spanish case, the LGCA Act established protected slots to prevent viewers up to 13 year-olds from watching inappropriate content. While the law sets general rules, the general-interest channels have all submitted to a self-regulation code regarding this issue (*Self-regulation code on television content and childhood*[26], 2004). As part of the self-regulation, the channels have established a committee to oversee the compliance on behalf of the corporations who signed the code formed by Mediaset, Atresmedia, RTVE, FORTA, Unidad Editorial and Net TV (Morales, 2015).

Another consideration to be made is when channels have an empty slot in their schedules. They often choose to place a programme similar to the proceeding one in the slot that aims at the same target to secure a transition of viewers. However, continuing to target a specific audience depends on how successful the previous content has been (MC. Dunlop, Channel 5 Corporation, July 6, 2015). At the same time, some slots are defined by the type of genre scheduled and not the target and, for example, Feature Films slots appeal to different groups each week depending on the microgenre of the film (J. Iriarte, Atresmedia, April 16, 2016).

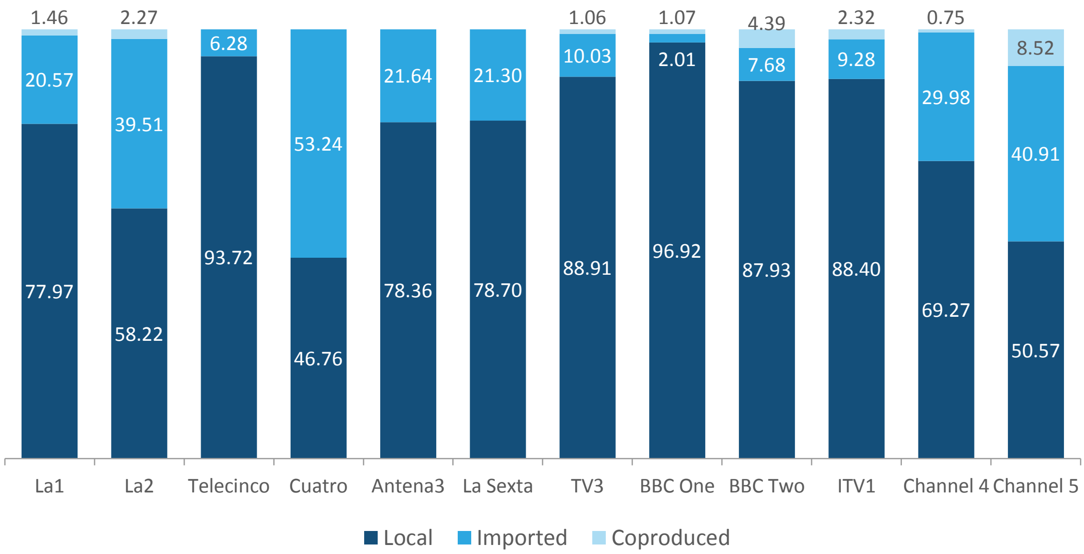
[26] *Código de autorregulación sobre contenidos televisivos e infancia.*

In the following section, the general considerations about the brand and schedule characteristics of each channel of the sample will be displayed. Furthermore, the conditioners of the quantity of imported content and the macrogenres acquired by each channel will be highlighted.

8.1.3. Channel branding and scheduling strategies

The strong oligopoly of the Spanish market and the presence of two general-interest channels at the same corporation directly affects the image of the channels. Each brand is not just created to stand out among competitors but to shape complementary strategies between their channels influencing the amount and type of imports acquired for each of them. In contrast, the UK television sector is characterised by a strong public broadcaster and three commercial general-interest channels at different speeds.

Chart 10 - Scheduling by types of production separated by channel. Season 2014-2015



8.1.3.1. RTVE strategy

The public Spanish corporation, RTVE, opts for different strategies for its two general-interest channels. La1 (9.8% in 2015) has a clear commercial and mainstream schedule. "La1 has a much more commercial focus, much more generalist and much more open to any kind of public" (MÁ. Morales, RTVE, January 22, 2016). This differentiates from, La2 (2.7% market share in 2015), which, despite being a general-interest channel, aims at niche audiences with a more alternative and social content approach.

Table 22 - La1 and La2 schedules by macrogenres. Season 2014-2015

	Fiction	Information	Infoshow	Show	Game Contest	Sports	Children	Youth	Educational	Religious	Others
La1	24.80	65.35	2.78	4.43		1.85					0.79
La2	22.93	60.22		1.94	3.81			0.80	6.82	2.61	0.87

Imported content is allocated 20.57% of the schedule of La1 leaving slightly more than three quarters of the schedule to local content and 1.46% to co-productions. The only macrogenre with imports is Fiction, as with the other Spanish general-interest channels with a high market share. Fiction is 24.80% of the schedule despite the main focus of the channel being Information which easily surpasses half of the scheduling time (65.34%). Just these two macrogenres are a colossal 90.15% of the schedule leaving little space for diversity of content and restricting the other macrogenres to a secondary role (Table 22).

By contrast, La2 has a higher levels of imported content (39.51%). At the same time, co-productions hold a meagre 2.27% but is the largest percentage of this type in Spain. Acquisitions belong to Fiction and Information, macrogenres that are 22.93% and 60.22% of the scheduling time of the channel, respectively. These two categories, as with La1, have a clear dominance on this public channel occupying 83.15% of the grid. However, La2 has a higher diversity of macrogenres present in its schedule such as Educational content (Table 22).

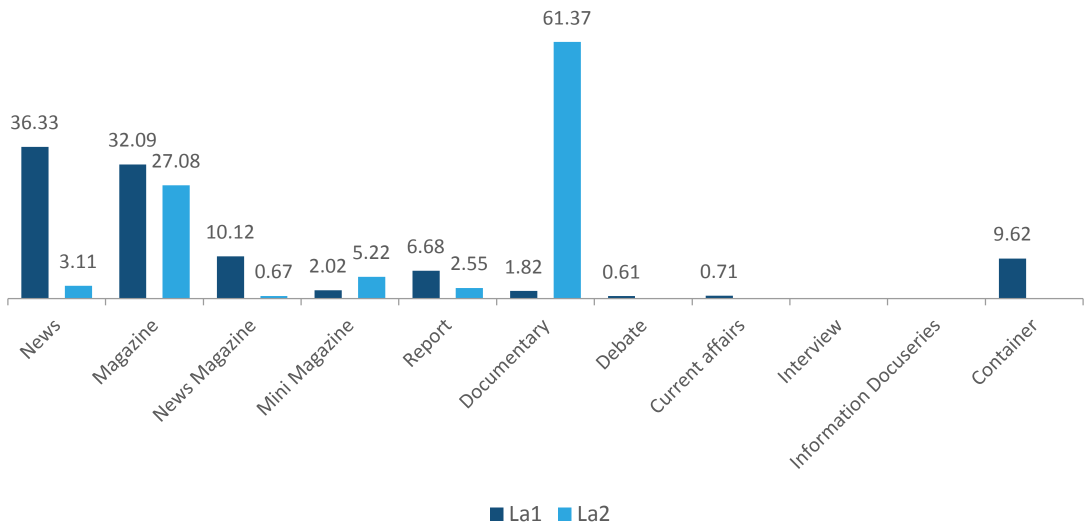
Regarding Fiction, there is a significant difference between the levels of imports on La1 (82.93%) and La2 (45.48%). To understand the high amount on the main channel, an anomaly for season 2014-2015, as previously mentioned, has to be highlighted since the percentage of imports was higher due to a budget crisis. Fiction, as the most expensive macrogenre to produce, has suffered some delays on La1 in the scheduling of its Serialised programmes. This is reflected in the Afternoon and Evening weekdays slots in the sample week where the channel usually airs local Serials. For example, the costume drama *Amar en tiempos revueltos* was broadcast from 2005 to 2012 scheduled horizontally from Monday to Friday from approximately 4pm to 5pm. Also the costume drama Serial *Acacias 38* started to broadcast on April 15, 2015 at 4:30pm followed by *Seis Hermanas* on the same date. However, La1 did not air any local Serials during the Afternoon slots from July 2013 to April 2015. Instead, until June 2014 it scheduled a Magazine programme and in the latter months two Non-Serialised Fiction titles were scheduled daily, Feature Films and TV Movies.

On La2, Fiction has more local content than La1 with almost half of the time dedicated to this macrogenre (La1, 11.20%; La2, 48.11%). This can be explained because the most present Fiction genres on La2 are Serials, highly local, which have 53.94% of the time dedicated to this macrogenre. Within Serials, 67.57% corresponds to local productions while 32.43% to imported. Specifically, three different titles are aired during the sample week: two locals (*Amar en tiempos revueltos* (2005-2012) and *Cuéntame cómo pasó* (2001-present)) and one imported from Italy (*Un passo dal cielo* (Rai1, 2011-present)). However, the two Spanish Serials were originally aired on La1 and are being rerun during the Morning, Midday and Afternoon slots of weekdays on La2.

The second most present Fiction genre is Feature Films (21.87%). In this genre, there is a large amount of local (53.33%) and co-produced content (29.33%) but as has happened in the case of Serials, the time allocated to old titles does not affect the creation of new local productions.

Information, the dominant macrogenre in both channels of RTVE, is the other category with imported content on La2. The high proportion of acquisitions at 48.28% is directly explained by the genres. Compared with the Information genres of the main channel of the public corporation, Chart 11 shows that La2 has a more niche focus in contrast to the commercial approach of La1. While the most predominant genres on La1 are News (36.33%) and Magazines (32.09%), on La2 the clearly predominant genre is Documentary with more than half of the time dedicated to this macrogenre (61.37%). The majority of these Documentaries (78.66%) were acquired from the international market. As with the first channel, the second genre on La2 is Magazine due to its flexibility. However, while most of the La1 Magazines discuss general topics (74.13%), on La2 they are concerned with social issues (66.80%).

Chart 11 - Information genres on La1 and La2. Season 2014-2015



While at the macrogenre level La1 and La2 have a very similar strategy, despite La2 having more diversity, there is an important difference when they are compared at the genre and microgenre levels confirming the different approaches of the public channels. While La1 corresponds more to the schedule of a commercial generalist channel, La2 aims to fulfil a clear public service remit by targeting niche audiences.

According to the executive of RTVE, the scheduling of alternative, social and cultural content on La2 is an active decision to make content available to viewers that would not be usually present on any other free-to-air channel. “If it is not broadcast by us there would be a lot of people that would not have access to this type of content and I think that as a public television company it is a very important task to do” (MÁ. Morales, RTVE, January 22, 2016). This scheduling, though important to fulfil the public service remit, leaves this channel truly far from the rest in terms of market share with only 2.7%.

8.1.3.2. Mediaset strategy

Mediaset is the Spanish corporation with the largest distinction between the brands and schedules of its two general-interest channels. Telecinco, the leader of the market with 14.8% of share in 2015, has created a more female brand. The macrogenre most present in its schedule is Infoshow or Infotainment (50.46%), which tends to appeal more to female audiences. Moreover, as suggested by the executive, the content on the channel has to be easy to follow and mostly orientated to middle-age and older women.

In contrast, Cuatro with 7.2% in 2015, a significant lower share than Telecinco, aims to appeal to a younger and more upmarket audience than the main channel. Consequently, the content scheduled has different characteristics. While Telecinco only has a small amount of time dedicated to Fiction, a very common macrogenre in the schedules of general-interest channels, it is the most common macrogenre on Cuatro (Table 23).

Table 23 – Telecinco and Cuatro schedules by macrogenres. Season 2014-2015

	Fiction	**Information**	**Infoshow**	**Show**	**Game Contest**	**Sports**	**Children**	**Youth**	**Educational**	**Religious**	**Others**
Telecinco	7.47	34.66	50.46	3.84	3.57						
Cuatro	46.03	29.76	15.48	7.08		1.65					

Regarding types of production, Telecinco is the Spanish channel with the highest percentage of local content in its schedule, due to its high level of Infoshow, which is entirely local. In addition, it is inversely proportional to the low level of Fiction at 7.47%, the only macrogenre with imported content on the channel (Table 23). On Cuatro imports fill 53.24% of the broadcasting time in the sample week while local productions only achieve 46.76%. This awards the channel as the biggest importer of content into its schedule in the sample, in both Spanish and British markets.

According to the Mediaset executive, they have tried to schedule more original programmes on Cuatro such as the Reality Game *Un príncipe para…* (2013-present, a format adaptation of *The Bachelorette* (ABC, US, 2003-presnet)) which fits in with the channel brand defined as "modern, different, fresh,…" (Á. López, Mediaset, June 9, 2015). Nevertheless, Fiction with 46.03% is still the predominant macrogenre of its programming.

On Telecinco 84.07% of the Fiction content is imported while the remaining 15.93% is allocated to local productions. Cuatro dedicates 89.66% of the Fiction time to imported programmes while the remaining 10.34% corresponds to the broadcasting of the local Sitcom *Gym Tony* (2014-2016), which is aired daily in the Prime Time slot after the News programme.

However, on Cuatro Fiction is not the only category acquired since imported content also belongs to the macrogenre Infoshow. A similarity is found here with Atresmedia because, as will be seen, the two main channels of both commercial corporations only import Fiction whereas their second channels also acquire Infoshow, and specifically Docuseries.

8.1.3.3. Atresmedia strategy

The two general-interest channels of Atresmedia are different in their scheduling strategy but at the same time complementary, as happens with Mediaset. Antena 3, 13.4% market share in 2015, tries to schedule programmes which appeal more to women, in direct competition to Telecinco but with a different approach in their macrogenres. The schedule of Antena 3 has a clear dichotomy between Information (35.61%) and Fiction (32.63%) as their main assets (Table 24). On the one hand, the high level of Information shows the importance of this macrogenre in the country even on the commercial channels. On the other hand, the amount of Fiction indicates the commitment to this macrogenre by the company and, in particular, the willingness to be the home of high quality local Fiction, with which they aim to define the image of the channel (J. Iriarte, Atresmedia, April 16, 2016).

The targeting of female audiences is reflected, for example, by the Afternoon and Evening slots, during weekdays but also at the weekend (J. Iriarte, Atresmedia, April 16, 2016). In the sample week, the local Serials *Amar es para siempre* (2013-present) and *El secreto de Puente Viejo* (2011-present) are scheduled in the Afternoon and Evening slots during weekdays. TV Movies are aired at the weekend.

However, the executive remarks that they also have the long term slot for *The Simpsons* (FOX, US, 1989-present) aiming at teens, young adults and adults up to 30-35 year-olds scheduled in the Midday slot preceding the News. Also, Game Contests are scheduled before the Prime Time News appealing to a broad audience. Another example is that they have the rights to broadcast the Champions League engaging with a male audience, despite not being represented in the sample.

While the strategy of Antena 3 corresponds to the image of a traditional mass appeal channel, La Sexta (7.4% of share in 2015) is currently more focused on male users with entertainment and Information, especially the Current Affairs genre, as their main asset (J. Iriarte, Atresmedia, April 16, 2016). This strategy is clearly supported by the time dedicated to Information across the week, which is 45.57%, 9.17 points above the average of the Spanish commercial channels, being the first macrogenre in its schedule. The aim of the company, as commented by the executive, is to have a specialised channel and to differentiate itself in the market.

The strategy of La Sexta has developed from when it was launched in December 2005. While in the early years of the channel Fiction and especially imported Fiction was particularly important, currently promoting the brand image has significantly changed the schedule. “It is true that La Sexta broadcast many more Series but that's also because when you launch a channel quickly and what you have immediate access to is always acquisitions, to start" (J. Iriarte, Atresmedia, April 16, 2016). In those early years, agreements were made with companies such as MGM and HBO acquiring the rights for all their Series. While this evolution is similar to Cuatro, the other new channel in Spain, Cuatro still depends greatly on imported productions.

Table 24 - Antena 3 and La Sexta schedules by macrogenre. Season 2014-2015

	Fiction	Information	Infoshow	Show	Game Contest	Sports	Children	Youth	Educational	Religious	Others
Antena 3	32.63	35.61	6.15	5.29	18.40						1.92
La Sexta	10.05	45.57	23.41	11.24		6.75					2.98

With respect to the types of productions, both channels have a similar level of imported programmes (Antena 3, 21.64%; La Sexta, 21.30%). On Antena 3 all foreign productions belong to the Fiction macrogenre, a category highly important to the channel (32.63%), and on La Sexta acquired productions are encountered in the Fiction and Infoshow macrogenres. The Fiction macrogenre has 33.67% of local programmes on the former channel. As stated by their executive, on the main channel "we have a high dependency on imports" (J. Iriarte, Atresmedia, April 16, 2016), especially in the Night slot where Feature Films are aired several days a week, and at the weekend where TV Movies have been aired from 4pm to 9pm.

All Fiction content is imported on La Sexta and the time is split between Feature Films (73.03%) and Series (26.97%). The Infoshow macrogenre is divided between 51.98% of local productions and 48.02% of imported content. The percentage of imports is completely assigned to the Docuseries genre, which is the most present Infoshow category (66.67%). In contrast, the other two Infoshow genres scheduled, all local productions, are closely linked to the main aim of the channel, information, since they belong to Satirical News (13.56%) and Political Talk Shows (19.77%).

8.1.3.4. CCMA strategy

The last corporation in the Spanish market is CCMA, the regional company of Catalonia, with only one general-interest channel. Their public status leads them to fill the schedule of TV3 (12.5% in 2015 in Catalonia) with a wide diversity of programmes but with a commercial approach to maintain its leadership in the market. Furthermore, one of the main objectives since its launch in 1983 was the normalisation of Catalan which was a forbidden language during the dictatorship of 1939-1975. This objective was fulfilled by local content but also by acquisitions such as Feature Films, Cartoons and Documentaries that were dubbed into Catalan: "dubbing in Catalan was a way to teach Children and elders to write, read and speak properly" (C. Blanch, CCMA, May 18, 2015).

Table 25 - TV3 schedule by macrogenres. Season 2014-2015

	Fiction	Information	Infoshow	Show	Game Contest	Sports	Children	Youth	Educational	Religious	Others
TV3	19.24	63.42	3.45	3.25	6.04	3.08				0.86	0.66

Local programmes occupy the bulk of the schedule while imports only represent 10.32% of the time of TV3. The macrogenres with acquisitions are Fiction with 19.24% and Information with 63.42%, which together have the largest share of the schedule with Information being the clear leader (63.42%) (Table 25). The high proportion of this macrogenre on the main channel is important because the Catalan corporation also has a thematic channel exclusively dedicated to Information content, 3/24, which had 1.5% of its market. This remarks the priority that Information has on the Spanish public channels in addition to the large amount of this macrogenre on both channels of RTVE (La 1, 65.33%; La2, 60.22%) and the channel 24h, an Information thematic channel.

On TV3 local Fiction has 58.90% of the time dedicated to this macrogenre while the remaining 41.10% is allocated to imports. Regarding Information, the presence of imported content is limited to 3.35% of the time. In addition, there is a tiny 1.67% of co-productions. Both types are only encountered in the genre of Documentary, as happened on La2, the other Spanish channel with Imports in the Information category. However, on TV3 Documentary is only 3.18% of its total schedule, far below the 36.97% on La2. 66.67% of the Documentary genre is imported while the other 33.33% are co-produced on the Catalan channel.

8.1.3.5. BBC strategy

Moving on to the British market, all corporations except the public BBC have one generalist channel. As defined in the agreement between the corporation and the government in 2016, the main channel, BBC One (21.9% market share in 2015), should schedule a high diversity of genres to appeal to a wide range of viewers (Agreement 2016 - 11.2.a). In the case of BBC Two (5.7%), the focus of the channel is similar to that of the main channel but with a special emphasis on Factual Entertianment programmes and innovative comedy and drama (Agreement 2016 - 11.2.b).

Table 26 - BBC One and BBC Two schedules by macrogenres. Season 2014-2015

	Fiction	**Information**	**Infoshow**	**Show**	**Game Contest**	**Sports**	**Children**	**Youth**	**Educational**	**Religious**	**Others**
BBC One	11.39	40.42	25.44		10.65	10.53				0.44	1.13
BBC Two	23.61	40	21.42		9.29	4.52					1.16

BBC One is the channel with the highest proportion of local productions among the British and also Spanish broadcasters in the sample. In the week analysed, 96.92% of the schedule is locally produced, leaving only 2.01% of the time to imports and 1.07% to co-productions. Despite the low level of imports, there are two macrogenres which have this type of production: Fiction and Infoshow. Fiction with 11.39% is the third most common macrogenre on BBC One but is at a significant distance behind Information at 40.42% and also Infoshow at 25.44% (Table 26).

In the case of BBC Two, this channel has a slightly higher quantity of imports (7.68%) and co-productions (4.39%) than BBC One despite local contents still being 87.93% of the schedule. The only macrogenre with imports is Fiction, which signify 23.61% of the time (Table 26). The low level of imported programmes in both markets, with a clear difference from the commercial channel, is the opposite of the scheduling of RTVE where La2, the second general-interest channel, has a higher level of foreign content, even higher than most commercial channels.

On BBC One, slightly more than three quarters of the time dedicated to Fiction is filled with local productions at 78%, leaving 12.65% for imports and 9.35% for co-productions. The presence of imported programmes in the Fiction macrogenre is higher on BBC Two at 32.51%. The remaining time is allocated to local productions (55.47%), and co-productions (12.02%). As with La2, BBC Two airs reruns of Serialised Fiction originally broadcast on the main channel of the public corporation. However, titles exclusively produced for BBC Two are also scheduled, distancing the channel from La2 by awarding a more prominent role to new local productions.

The macrogenre Infoshow marks another distinction from the Spansih public corporation. While on BBC One the presence of Infoshow is a notable 25.44%, RTVE does not opt for this macrogenre. The genre broadcasts are mainly Docuseries with 71.67%, but there is also a significant quantity of Reality Games at 20.20%. Imported Infoshows only represent 2.22% of the macrogenre on BBC One and correspond to the Reality Game genre.

8.1.3.6. ITV strategy

The main purpose of ITV1 (14.2% of share in 2015) since its inception has been to compete directly with the BBC. This has led the corporation to schedule programmes with mass appeal scheduling. In addition, one of its public service objective is to counteract the London focus of the BBC with regional programming. Local programmes occupy 88.40%, the majority of the time on the ITV1 schedule. As said by its executive, most content for the main channel is locally commissioned and therefore little content is acquired f at 9.28%. Nevertheless, the percentage of imports on ITV1 is higher than the BBC channels.

Table 27 - ITV1 schedule by macrogenres. Season 2014-2015

	Fiction	Information	Infoshow	Show	Game Contest	Sports	Children	Youth	Educational	Religious	Others
ITV1	14.11	31.83	25.83	4.08	11.29	5.27	5.14				2.45

The two macrogenres with imports are Fiction and Children. Local and imported Fiction programmes are both allocated 45.33% of the time dedicated to this macrogenre while the remaining 9.34% is filled with co-productions. Concerning Children's content, the time allocated to this macrogenre (5.14%) is significant especially because ITV has a thematic channel, Citv, exclusively for this category. On their main channel, all these programmes are scheduled in the Morning slot of the weekend where imports take 56.10% of the time dedicated to the macrogenre, while co-productions represent 4.88%.

8.1.3.7. Channel 4 Corporation strategy

Channel 4, with 4.8% market share in 2015, was launched with a clear public service remit and was created as a public channel with a commercial aim, as mentioned before. In this study, this channel shall be considered as commercial. Most of the initial public remits are still at the core of the corporation and, as an example, Channel 4 corporation outlined a diversity plan at the end of 2015 (The 360º Diversity Charter) where quotas for the proportion of women, people with disabilities, black and minority ethnic and LGBT on and off screen were stipulated.

> The remit was set up to target the subgroups that weren't necessarily well catered for before. I mean this was back years ago. So we do still target younger audiences on the main channel compared to the other terrestrials in the UK. But also racial minority groups (K. Ames, Channel 4 Corporation, November 25, 2015).

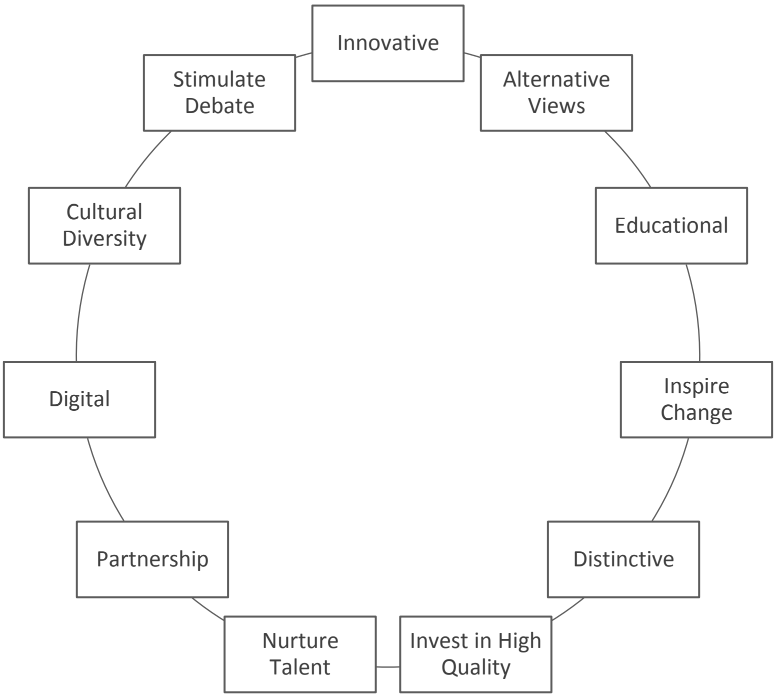


Figure 14 - Channel 4 public service remit

Source: Adapted from Channel 4 (2015).

Imports are 29.98% of the Channel 4 schedule while 69.27% is filled with local programmes. "The majority of the main channel is commissions because we've got a public service remit. So we are primarily there to commission British content" (K. Ames, Channel 4 Corporation, November 25, 2015). This channel cannot produce its programmes in-house like the BBC or ITV are able to due to the initial remit being aimed at promoting the independent production sector and therefore all of the local programmes have to be commissioned by an independent company.

Notwithstanding, this broadcaster was the first British channel to speculate on purchasing imported productions, particularly US programmes. According to the executive, "I think Channel 4 is there to kind of take risks and I think way before my time Channel 4 did take risks with American content" (K. Ames, Channel 4 Corporation, November 25, 2015). However, US content is no longer innovative and distinctive, two of the remits outlined by the channel. Thus, the levels of imports has decreased despite still representing 29.98% of the sample week, a figure much higher than on the BBC or ITV1 channels. Furthermore, acquisitions continue to be part of the channel brand due to key programmes such as *Fargo* (FX, US, 2014-present) or *Homeland* (Showtime, US, 2011-present) (K. Ames, Channel 4 Corporation, November 25, 2015).

Table 28 - Channel 4 schedule by macrogenre. Season 2014-2015

	Fiction	Information	Infoshow	Show	Game Contest	Sports	Children	Youth	Educational	Religious	Others
Channel 4	33.44	9.49	38.22	1.07	10.56	4.27					2.95

As with other channels in the sample, the majority of Channel 4 imports are found in Fiction but it also has a small percentage of acquired Infoshow, the two macrogenres with the highest proportion of time on the channel (Table 28). Fiction has a vast majority imports at 80.63% while local productions only represent 17.11% leaving a tiny 2.26% for co-productions. On Channel 4 the proportion of imported Infoshow (7.89%) is significantly lower on Cuatro and La Sexta. Docuseries, which with 38.98% is the genre with the most time allocated of the genres, has acquired content.

8.1.3.8. Channel 5 Corporation strategy

Channel 5 (3.9% in 2015) is the free-to-air general-interest channel with least stringent public service remit in the UK and this is reflected in its schedules. The poor reputation it acquired during the initial years obliged the corporation to rebrand their image several times. The channel has used, among other strategies, well-known US Series and Reality Games such as *Big Brother* to increase their quality and appeal. Currently, as commented by their executive, the channel aims to particularly attract 16 to 34 year-olds viewers (MC. Dunlop, Channel 5 Corporation, July 6, 2015).

Table 29 - Channel 5 schedule by macrogenre. Season 2014-2015

	Fiction	**Information**	**Infoshow**	**Show**	**Game Contest**	**Sports**	**Children**	**Youth**	**Educational**	**Religious**	**Others**
Channel 5	38.59	9.15	29.89				20.49				1.88

The broadcaster with the smallest share of the British market is also the generalist channel with the largest amount of imported productions in its country with 40.91% of the scheduling time. The rest is divided between local productions at 50.57% and co-productions at 8.52%. The high levels of imports is confirmed by being the only UK channel with Fiction (38.59%) as its main macrogenre, with a difference of nearly 10 points from Infoshow, the second category (Table 29).
Channel 5 is also the broadcaster with the most macrogenres containing imports in the whole sample: Fiction, Infoshow and Children's programmes. 88.80% of the Fiction time is filled with imported Fiction while the remainder belong to co-productions at 11.20%. Regarding Infoshow, the proportion of imports is a low 2.10%.

Lastly, it is important to highlight the importance of Children, which receives 20.49% of the time of the total schedule, the highest of the entire sample. The presence of this category has increased on the channel in recent years as required by Ofcom despite no obligation to fulfil any quota (Ofcom, 2015). The vast majority of these programmes (96.64%) are scheduled in the Morning slot everyday of the week. This slot, especially the early morning of weekdays, coincides with the time that children watch cartoons before going to school. Half of the time dedicated to Children is local (50.15%) while 29.36% is imported from other television markets and the remainder completed by co-productions.

As has been shown, the brand and schedule composition are internal factors directly influencing the quantity of imports on each channel. In Table 30 a summary of imported content in the schedules of the sample is displayed.

In general, the channels with the highest amount of imports in both countries are those with a lower market share. However, another important factor influencing the level of imports on each channel has to be highlighted. Those channels in the sample with a higher proportion of Fiction also have a significantly greater amount of foreign acquisitions. Therefore, Cuatro and Channel 5 have the largest amounts of both of Fiction and imports. At the same time, this helps to explain the type of productions present on the Atresmedia channels. While Antena 3 has a higher share in 2015 with 13.4% compared to the 7.2% of

La Sexta, imports have a similar proportion due to the main role Fiction has in the first channel. La Sexta is focused on the Information genre but has imports from two macrogenres, Fiction and Infoshow.

Another difference encountered between the channels with differing market shares is that while the former mainly import Fiction, the latter also import a significant amount of Infoshows. In addition, ITV1 and Channel 5 acquire Children's contents in order to fulfil their public service remit. These results allow us to partially confirm Hypothesis 1 subject to considerations regarding the presence of Fiction. (H1: "Commercial channels with a lower share in both markets (Cuatro, La Sexta, Channel 4 and Channel 5) have a higher proportion of imports and a higher diversity of genres with imported programmes than the market leaders").

Comparing the results of public and commercial channels, it can be seen that there are distinct differences between the two countries. Public channels in the UK have significantly less imports than their commercial competitors (BBC One, 2.01%; BBC Two, 7.64%), compared not only with Channel 4 (29.98%) and Channel 5 (40.91%) but also with ITV1 (9.28%). In contrast, the average proportion of imports for both types of ownership in Spain are very similar (public, 23.33%; commercial, 26.85%), showcasing the generally higher dependency of Spain on the international television market. In addition, the second channel of the public corporation, La2, is the channel with the second highest percentage of imports (39.51%) in the market. Consequently, this confirms Hypothesis 2 for the British market but it is rejected for the Spanish broadcasters. (H2: "Public channels have a lower proportion of imports since they prioritise local productions").

Table 30 - Summary of imported content on each channel. Season 2014-2015

Channel	Macrogenres with imported content	Proportion of imported content	Genres with imported content	Proportion of imported content
La1	Fiction	82.93	Feature Films	85.34
			TV Movies	100
La2	Fiction	45.48	Feature Films	17.33
			Series	100
			Serial	32.43
			Mini-Series	100
	Information	48.28	Documentaries	78.66
Telecinco	Fiction	84.07	Feature Films	100
			TV Movies	100
			Serial	57.14
			Mini-Series	100
Cuatro	Fiction	89.66	Feature Films	100
			TV Movies	100
			Series	100
	Infoshow	77.35	Docuseries	94.27
Antena 3	Fiction	66.33	Feature Films	93.85
			TV Movies	100
			Animation Series	100
La Sexta	Fiction	100	Feature Films	100
			Series	100
	Infoshow	48.02	Docuseries	72.03
TV3	Fiction	41.10	Feature Films	74.52
			Series	100
	Information	3.35	Documentaries	66.67
BBC One	Fiction	12.65	Feature Films	57.50
	Infoshow	2.22	Reality Game	10.98
BBC Two	Fiction	37.43	Feature Film	50.62
			Series	86.05
ITV1	Fiction	45.33	Feature Films	76.40
			Series	58.62
	Children	56.10	Cartoons	62.07
			Mixed Animation	62.50
Channel 4	Fiction	80.64	Feature Films	100
			Series	48.00
			Sitcom	100
			Animation Series	100
	Infoshow	7.89	Docuseries	20.25
Channel 5	Fiction	88.80	Feature Films	64.25
			TV Movies	100
			Series	100
			Serial	100
	Infoshow	2.10	Docuseries	2.76
	Children	31.19	Cartoons	29.67
			Mixed Animation	100

8.2. Glocal factors

Television Acquisitions Executives form a transnational professional class with shared standards across different television markets (Kuipers, 2012; Sassen, 2001). These professionals combine this knowledge with the routines of their local market in order to act as cultural intermediaries between the transnational trends and the interests of the local corporations and viewers. The glocal factors refer to those elements that combine these two opposing forces influencing the selection process of imported television content. Thus, while Acquisitions Executives share common understandings of the television flows, the transnational logics have to be adapted to local concerns.

The four glocal factors that can be extracted by the in-depth interviews with the sample executives are: volume, notion of quality, perception of the different origins and macrogenres and genres assumptions.

8.2.1. Volume needed

The volume needed of a programme directly affects the process decision of the channels because it has to match the volume available in the international market. It should be pointed out that as with most decisions in the acquisition process, there is no solid rule which explains all the choices. Despite this, the considerations on volume are affected and conditioned by the overall structure of the schedule of each channel, the slot the programme is going to be scheduled into and the macrogenre or genre to be acquired.

Regarding the slot, the scheduling techniques of Day Time (Morning, Midday, Afternoon and Evening) determine the needs of the channels in contrast to Prime Time and Night. "You are looking at the slot intended for, the volume, is it 10 episodes, is it 20 episodes, is that a good or a bad thing, is that useful" (S. Breslau, ITV, September 16, 2015). Day Time content is usually scheduled with an horizontal structure from Monday to Friday (in some cases as with *The Simpsons* (FOX, US, 1989-present) on Channel 4 and Antena 3 from Monday to Sunday). Thus, this requires a high number of episodes or content in order to completely allocate the pertinent slot every day.

For example, Atresmedia comments that one of the reasons to acquire Canadian Crime Watch Series was because a large volume was needed for the Morning slot. Other motives for the purchase were that they repeat well and the content was very ad hoc for the channel, which tends to target more male audiences (J. Iriarte, Atresmedia, April 16, 2016). Another example, in this case from Mediaset, was the acquisition of *Alarm für Cobra 11 – Die Autobahnpolizei* [*Alarm for Cobra 11 – The Highway Police*] (RTL Television, DE, 1996-present), a Series aired on Cuatro also scheduled in the Morning slot. They describe what they needed: "We have to go to the market to look for a Series of more masculine action-adventures with a lot of episodes and at a certain price but not a radical thing that women cannot enter" (Á. López, Mediaset, June 9, 2015).

In contrast, products acquired for the Prime Time or Night slots are only aired once a week. In the case of the UK, only one episode is scheduled per week. Therefore, a large amount of volume is not a major consideration when the decision is made. As Channel 4 executive states, for Prime Time Drama (Series and Serials) volume is not important (K. Ames, Channel 4 Corporation, November 25, 2015).

There are also differences between macrogenres and genres in terms of the volume needed. For Fiction, specifically Series and Serials, the slot will determine if a higher or lower volume of episodes is needed whereas in the case of Factual Entertainment, for example, volume is essential in establishing a brand with the programme (K. Ames, Channel 4 Corporation, November 25, 2015).

Volume also affects the acquisition of Feature Films and TV Movies. Despite being stand alone pieces, channels usually do not buy just one film at a time, they are acquired in packages, which should not be confused with output deals, as will be clarified later. This practise usually benefits the US majors because they are the distributors with the largest volume of titles, greatest production strength and the broadest libraries. Local corporations have access to a large library of titles with little negotiation.

In some cases, the need for high volumes has begun a trend in scheduling products originating elsewhere, for example, TV Movies from Germany in the Spanish market. Following success of scheduling TV Movies in the Afternoon and Evening slots at weekend by the main channel of Atresmedia, Antena 3, competing channels such as La1 copied the strategy. However, there was insufficient volume available in the US market to cover the increasing needs.

This led the Antena 3 Department of Acquisitions to start looking to other markets finding that Germany was a strong producer of the genre, especially the channel ZDF and the distributor Beta Film. Thus, German TV Movies started to appear in the Spanish schedules. Nowadays, they are not only a regular option for the channel but also for the competing public channel La1 (J. Iriarte, Atresmedia, April 16, 2016; MÁ. Morales, RTVE, January 22, 2016).

8.2.2. Notion of Quality

The quality level of products is considered when deciding which content to buy. However, for the executives the definition of quality is a vague concept not defined in a specific way. Nevertheless, the way quality or ideas related to the concept are discussed is similar among all the executives across the two countries capturing the professionalism of these cultural intermediaries. "Television buyers to me seemed like a 'cosmopolitan tribe': a highly networked group of transnational professionals with similar standards, values and even rituals such as annual gatherings in Cannes" (Kuipers, 2012: 588).

Analysing the interviews, quality is firstly used to refer to the level of the aesthetics and the scripts of the products. For example, Channel 5 acquired the Series *Olympus* (CA & UK, Super Channel, 2015) without watching the pilot. It was assumed that it would have high quality effects, "but the green screen was terrible" (MC. Dunlop, Channel 5 Corporation, July 6, 2015). So, if the pilot had been watched, it would not have been purchased due to the low quality.

Another example is from ITV when the executive commented that in all shows they ask themselves if the content is "good enough" (S. Breslau, ITV, September 16, 2015). Thus, channels are deeply concerned with the quality of the content because their brand image is directly affected. "The quality is up to scratch to our channel brands because brands are very important to us and anything that could threaten that we wouldn't want to acquire" (K. Ames, Channel 4 Corporation, November 25, 2015). In other words, if a programme is appropriate but has low quality levels, it will probably not be acquired.

A second aspect which quality is associated with, besides aesthetic and internal storyline, is its capacity to repeat well. As commented by RTVE, if Documentaries have sufficient quality, they will be scheduled in different time slots and obtain similar ratings in each space. As will be stated later, the ability to repeat is also considered important when deciding which title to purchase for imported Serialised Fiction.

A third element linked to quality is price with a higher level of quality being directly associated with a higher cost, although this is not the only aspect. If more quality is required in a slot, more money will have to be spent on it (MÁ. Morales, RTVE, January 22, 2016; S. Breslau, ITV, September 16, 2015).

The fourth and final element is the quality associated with the macrogenres and the genres of the imports. For example, the Spanish commercial corporations (Mediaset and Atresmedia) argue that by scheduling an imported *Factual,* a general-interest channel could be made to resemble a portfolio channel since these niche products are not high quality. Moreover, this may even discredit the brand.

8.2.3. Perception of origins

Origin is another glocal factor which directly influences the decisions of broadcasters. As has been seen in the theoretical framework section, historically it has been found that the US has dominated the international television flows. Despite the current technological equality when purchasing content from any part of the world, the source of a programme is still one of the main considerations influencing the decisions of Acquisitions Executives, favouring the hegemonic position of the US, as will be explained. In this section, a general view of the sources of imported content from the sample will be presented. In addition, the main aspects concerning origins will be discussed from the viewpoint of Acquisitions Executives to understand the reasons for the predominance of certain markets in Spain and the UK.

The percentages presented across this section do not pretend to be representative of all the sources used during season 2014-2015 but to exemplify the tendency of where the programmes are being acquired from in the two markets. In addition, this data shows the main differences between channels and types of ownership. Furthermore, the results extracted from the interviews will shed more light to complete the overall picture of where programmes are being imported from and the reasons for these.

Sources will be shown to highlight the complexity of the presence of imported content. While a range of programmes is produced within just one local market, there is television content whose origin is shared between two countries. In order not to overlook these cases, imports will be distributed between eight different categories. The first four correspond to the individual territories where content is acquired in the two sample markets (European Union (EU), US, Other English-speaking countries and Others) whereas the remaining four present the imported co-productions between countries belonging to distinct territories (US and EU, US and English-speaking countries, US and Others and lastly, EU and Others). In addition, in the main tables the specific percentages of the sources from each territory will be displayed.

Table 31 - Origin of imported content by country. Season 2014-2015[27]

	EU	US	US + EU	US + Others	US + OESC[28]	EU + Others	OESC	Others
SP	**30.76**	**48.74**	**6.27**		**7**	**1.19**	**3.99**	**2.05**
	DE 10.66		US + UK 2.61		US + CA 6.15	FR + CA + JP 1.19	CA 2.88	JA 0.85
	UK 8.83		US + DE 1.27		US + AU 0.85		AU 1.11	KR 0.85
	IT 4.34		US + DE + PY + UY 1.08					TR + EG + IN 0.35
	FR 2.10		US + UK + RU 0.81					
	AT 1.23		US + FR 0.50					
	UK + FR + IT 0.81							
	DE + AT 0.69							
	IE 0.69							
	BE + FR 0.65							
	DE + UK 0.38							
	FR + DE 0.38							
UK	**1.82**	**71.80**	**1.75**	**2.59**	**2.17**		**19.87**	
	BE + NL 0.98		US + FR 1.75	US + IN 1.40	US + CA 2.17		CA 9.31	
	IS 0.84			US + NW 1.19			AU 8.40	
							AU + SG 1.46	
							NZ 0.70	

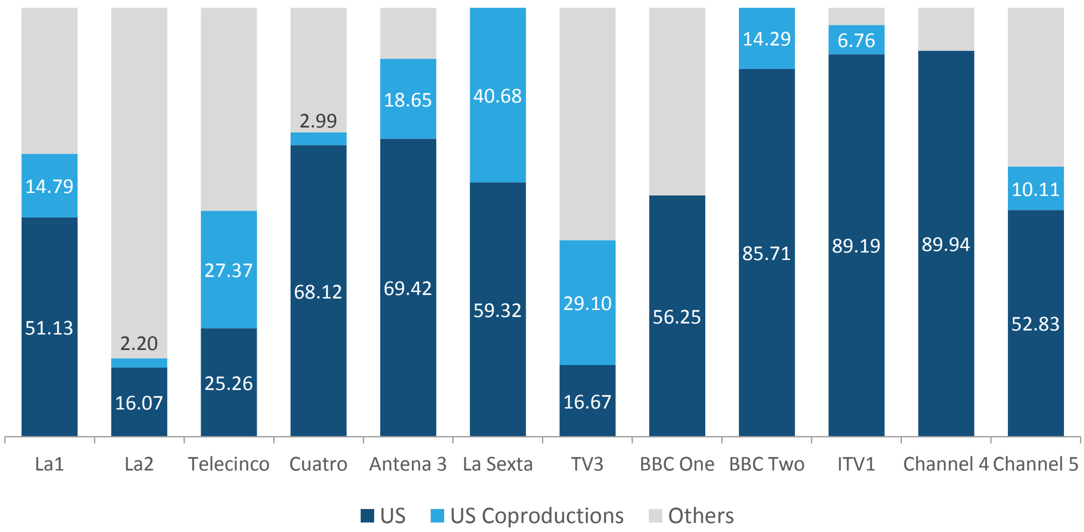
[27] List of country abbreviations – p. 14.
[28] Other English-Speaking Countries.

8.2.3.1. The hegemony of the US

Overall, during the sample week Spain has a higher diversity of sources, with eighteen, than the UK, which has ten, but the source found most in both markets, and clearly ahead of the rest of the markets, is the US. Nevertheless, the penetration level of US products is significantly different between the sample countries since it reaches 48.74% of the total of imported programmes in Spain while in the UK these titles are 71.80%.

Furthermore, the level of co-productions between the US and other territories is also significant in both markets taking 13.25% of the time dedicated to imports in Spain and 11.73% in the UK. As can be seen in Chart 12, the dominance by US products is encountered across the schedules of all the channels with only two Spanish public channels, La2 with 18.37% and TV3 with 45.77%, having less than half of the time allocated to US imported content and US co-productions.

Chart 12 - Proportion of US imported content separated by channel. Season 2014-2015



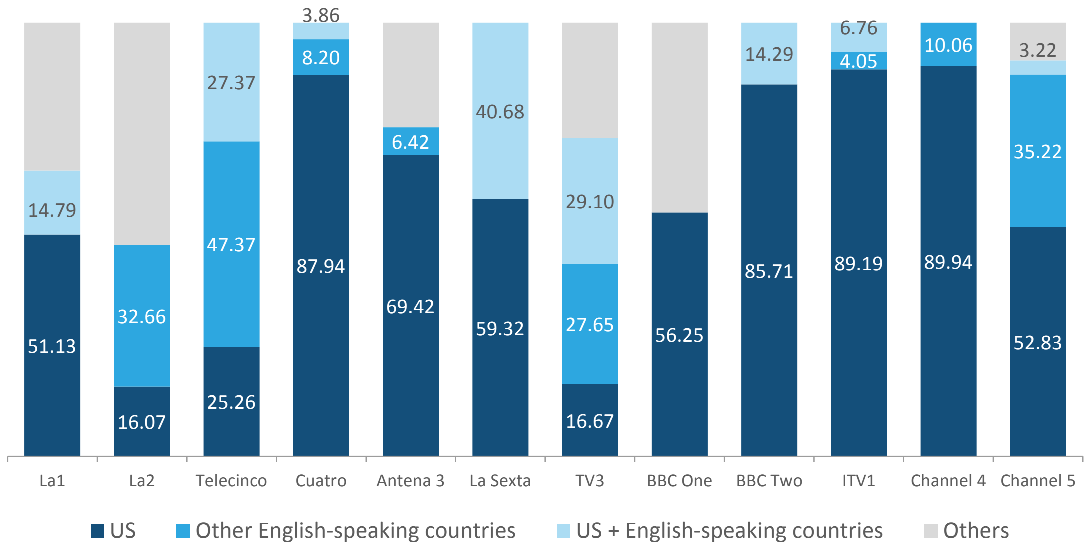
While the advantages of the US mentioned in other decades by many scholars are still true (Doyle, 2002; Hoskins et al., 1997, 2004; Steemers, 2004), the current main advantage of the US, as expressed by the executives, is that local viewers are used to their products. Therefore, buying US programmes is considered to be safer than opting for products from other territories. Even in the UK, programmes from another English-speaking country such as Australia are considered much more speculative than buying a US Series, as commented on by the Channel 5 executive.

Thus, the long running imbalances in the exchanges and the conservative decisions of media corporations to secure profitability are preventing the exploration of a higher diversity of programmes from a wider range of sources. However, we have to differentiate between Day Time and Prime Time practices. While in the most competitive slots channels do not innovate, the less competitive parts of the day allow the entrance of a greater variety of origins and genres.

For example, the Australian Serials of *Home and Away* (Seven Network, 1988-present) and *Neighbours* (Seven Network – Network Ten, 1985-present) have been present on Channel 5 for many years in the Midday and Afternoon slots. Contrarily, the acquisition of the Series *Wentworth* (AU, Sotto, 2013-present) for scheduling in Prime Time was still considered as dangerous: "we took a risk with that and it really paid off" (MC. Dunlop, Channel 5 Corporation, July 6, 2015).

8.2.3.2. Other English-speaking productions

Chart 13 - Proportion of English-speaking imported content separated by channel. Season 2014-2015

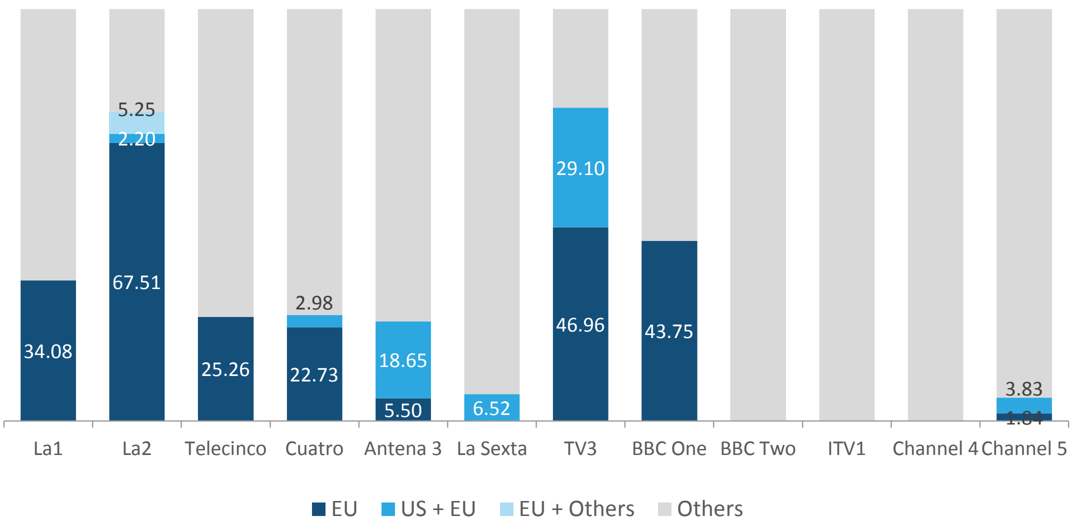


The strong dominance of the programmes from the US in the UK schedules is also countered with other English-speaking productions. In this market, viewers are not used to watching dubbed content and channels choose to subtitle, which is in contrast to Spain. Therefore, this favours productions originally produced in English that come from the other important English television markets, besides the US, such as Canada, Australia or New Zealand (S. Breslau, ITV, September 16, 2015; K. Ames, Channel 4 Corporation, November 25, 2015; MC. Dunlop, Channel 5 Corporation, July 6, 2015). These programmes represent 19.87% of British imports during the sample week. Together with US productions, they reach 100% of imports on channels BBC Two, ITV1 and Channel 4 (Chart 13).

This is paradigmatic when compared with the Spanish market, where there are no productions made in any other Spanish speaking country. One of the causes explaining the phenomenon might be that Spanish viewers mostly watch foreign-language programmes dubbed. In addition, this questions the concept of geolinguistic regions presented by Sinclair, Jacka and Cunningham (1996) since language and common past are not elements that directly encourage transnational audiovisual flows.

8.2.3.3. European works

Chart 14 - Proportion of European imported content separated by channel. Season 2014-2015



Despite the efforts of the EU to create an internal audiovisual flow among Member States, the presence of non-local European works is still secondary in both sample markets, as already highlighted by the EAO (Lange, 2014). Nevertheless, productions from some territories in Europe are more prone to be in the schedule of other local television markets, public or commercial. The territories highlighted in the interviews were the UK (in the Spanish interviews), Germany, France and the Nordic countries (Denmark, Sweden and Norway).

While European programmes are in minority in both countries, there is a distinct quantitative difference between the Spanish and British schedules. In Spain these products reach 30.76% of the time dedicated to imports whereas in the UK this percentage does not even reach 2% (1.82%). Furthermore, European co-productions, which count as European works, are also more prevalent in the Spanish market (US and Europe, 6.27%; Europe and Others, 1.19%) than in the UK (US and Europe, 1.75%). The only similarity across markets is that the quantity of European works is higher on the public broadcasters than in the commercial channels of both countries (Chart 14).

As previously seen, the content quotas in Spain referring to European works correspond to those established by the transposition of the AVMS Directive (Previously the TWF) into the Spanish legislation, with some specifics for the official languages in the country. In contrast, while the UK has also transposed the European legislation, the most restrictive quotas are in regard to the original productions of the channels, that is to say, local productions.

While this cannot be the only reason attributed to the absence of European content on the British general-interest channels analysed, it highlights that the focus of the government has not been centred on European works but only on local productions. Notwithstanding, while not being a regular part of the schedules of the general-interest channels, a limited amount of European content is part of the secondary channels of these corporations since for example, several public and commercial companies have slots for European works.

BBC Four has been the home of a number Nordic-noir programmes produced in Denmark and Sweden. Some of the shows broadcast have been *Forbrydelsen* [*The Killing*] (DR1, DK, 2007-2012), *Broen/Bron* [*The Bridge*] (SVT 1 & DR1, SE & DK, 2011-present) and *Borgen* (DR1, DK, 2010-2013). These titles, aired in the original version with subtitles, target a niche audience but have created a quality brand in this country (Jensen & Waade, 2013).

ITV acquired a Swedish drama for its portfolio channel UNCLE but, as explained by the executive, they do not aim to follow this trend in the near future because Series in foreign languages do not have a mass appeal.

> Nordic-*noir* has become really popular in the UK as you know from the BBC and BBC Four and *The Killing*, *Borgen*, *The Bridge* and the rest of it. So we kind of dipped a little toe in that water but the BBC obviously has a very different remit than ITV. They are not commercial and they are funded differently, they are a public broadcasting service. So we don't really do the sort of experimental stuff that they can do (S. Breslau, ITV, September 16, 2015).

Channel 4 also has a specific place for foreign language shows on the portfolio channel More4. In addition, it also aired the French shows *Les revenants* [*The Returned*] (Canal+, FR, 2012-present) on the main channel. However, the second season was aired on More4.

In addition, Channel 4 has launched an associated VoD service focusing on foreign acquisitions called Walter Presents, which includes titles such as the Spanish show *Vis a Vis* [*Locked Up*] (Antena 3, 2015-2016). The first episode was aired on Channel 4 on May 17, 2016 and immediately following this, the whole of the first season was available online (Frizzell, 2016). This service acquires content from all over the world, not just Europe and English-speaking countries.

In the Spanish market, European works are assigned half the time dedicated to imports on the public channels indicating the relevant quantitative and qualitative role they have as part of their public service remit. On average, programmes solely produced within the EU account for 54.70% of imports. In addition, 5.41% are co-productions between Europe and the US and 2.94% of imports in the Spanish public channels are works produced between the EU and other territories.

Commercial Spanish channels also purchase European content regularly. However, they consider it more carefully when acquiring them than when purchasing a programme from the US. The slot where the title is going to be schedules also greatly influences the considerations. Recently, the European territories that have been more attractive for these channels are the UK and Germany.

Mediaset does not acquire many British productions. Nevertheless, Telecinco aired the Serial *The Paradise* (BBC One, 2012-2013) in the Morning slot of the weekend, a low competition slot, in the sample week. Atresmedia has broadcast the British Serial *Downton Abbey* (ITV1, 2010-2015), the Mini-Series *Sherlock* (BBC One, 2010-present), co-produced with the US, and in season 2014-2015 *Broadchurch* (ITV1, 2013-present) (J. Iriarte, Atresmedia, April 16, 2016).

The first season of *Downton Abbey* was extremely successful because it was an uncommon type of content as a Prime Time soap opera. However, in the second season the audience dropped and its transmissions ended on a portfolio channel. Regarding this show, it has to be highlighted that while commissioned by ITV and starring British actors, the Series was acquired through a US distributor (Universal) highlighting the strong connection between the British and US audiovisual market (J. Iriarte, Atresmedia, April 16, 2016). Despite acquiring many productions, Atresmedia highlights a negative aspect of British Series and Serials: their short seasons. Thus, by acquiring one title not as many scheduling gaps are filled as when purchasing a US production.

German programmes are not scheduled in the UK market but they are present in all Spanish corporations except TV3. However, different genres are purchased so, for example, RTVE and Atersmedia schedule TV Movies whereas Mediaset acquires Serialised Fiction. As already mentioned, Atresmedia was the first to start purchasing German TV Movies. This genre has been scheduled on the channel beginning in season 1992-1993 but as a consequence of the increasing success US titles became insufficient to fill the gaps needed once other channels started to acquire the genre.

> We saw that the Germans were producing very similar products, the *Rosalin Picher* and all these novels that are very famous authors, like a Nora Roberts, and we saw that they had endless collections of TV Movies, all super romantic, super feminine (J. Iriarte, Atresmedia, April 16, 2016).

Due to it being a product that is suitable for their target, it has functioned particularly well since the beginning. This allowed Spanish audiences to become accustomed to German TV Movies which can now perform as well as US TV Movies. Another reason to buy from Germany was because this genre was in decline in the US market approximately five years ago and quality was falling. Now the genre has regained prestige and the productions have increased. For example, the Life Time channel only schedules TV Movies resulting in a vast catalogue.

The other genre acquired from Germany in Spain is Series, but only for low competitive slots. Mediaset has the rights over *Alarm für Cobra 11 – Die Autobahnpolizei* [*Alarm for Cobra 11 – The Highway Police*] (RTL Television, DE, 1996-present). However, "*Alert Cobra* is a Series produced in Germany for Prime Time, is broadcast in Prime Time in Italy and is broadcast in Prime Time in France but we still do not dare to schedule a German Series in Prime Time here" (Á. López, Mediaset, June 9, 2015). Another example is the Series *Kommissar Rex/Il commissario Rex* [*Inspector Rex*] (Österreichicher Rundfunk, AT & IT, 1994-2004 & 2008-present) which was aired in Prime time in Austria and other European markets but in Spain was scheduled in the Evening slot.

The other European market considered to be producing high quality content is France, but is more inconvenient to purchase. The French Serial *Les revenants* [*The Returned*] (Canal+, FR, 2012-present) was considered by the Spanish commercial corporation Mediaset: "We were valuing it and at one point we considered it but we said better to wait until the Americans remake it. Why take the risk?" (Á. López, Mediaset, June 9, 2015). In addition, they highlight that their products have too much continuity for the number of episodes they have, so they assume the majority of titles would not work in the Spanish schedules. This same Series was aired on Channel 4 during its first season but the second season was pushed on to the portfolio channel More4 (K. Ames, Channel 4 Corporation, November 25, 2015; Plunkett, 2013).

Despite the criticism, in the summer of 2016 two French Mini-Series were aired on the Spanish general-interest channels. *Une chance de trop* [*No second chance*] (TF1, FR, 2015-present) was aired on La1 while *Les Témoins* [*Witnesses*] (France 2, FR, 2015) was scheduled on Cuatro. Summer being the season with lowest levels of television consumption and when most local programmes pause for a recess, both productions were scheduled in the early Night, the most competitive slot for Fiction in the country.

In summary, European content is still considered to be a higher risk option than US programmes because the audiences in both countries are not used to them. In the UK, a trend is developing to have foreign language content and especially European on the portfolio channels and online platforms. However, its presence on the main channels is more problematic since they are considered to appeal to niche audiences with one of the reasons being that they are subtitled. In Spain, there is a greater level of European programmes, particularly Fiction and especially on the public channels. The commercial channels consider them in their selections but they continue to be thought of as more problematic than US titles, with the exception of a small number British and German productions.

Nevertheless, European content, and Serialised Fiction in specific, also has strong points. Programmes now have a more interesting structure in terms of the script and aesthetics and are much less expensive than US Series. "Increasingly people know how to make an international look and consumption, a kind of story that's easier to travel" (Á. López, Mediaset, June 9, 2015). Thus, if markets produce in a more neutral, international style then these productions are more likely to be acquired by other television markets since they are considered to be less of a risk.

European co-productions with other territories

It is important to mention that within the European works there are titles that have been produced between a European country and other territories, mainly the US. This technique is used by the US production companies to avoid the restrictions that EU members have on foreign content. With this strategy, their products count towards the fulfilment of the European Works quota.

There are several co-productions between the US and a European country in the sample. In the Spanish schedules, the largest proportion is jointly titles from the US and the UK reaching the 2.61% of the total of imports. Traditionally, the UK has been the European market that has worked most closely with the American companies since it is one of the biggest markets in terms of size and economics in the continent, with London as a key player in the transnational audiovisual flows. In addition, the shared language facilitates the productions. It has to be seen what will happen in the near future when the UK leaves the EU. If UK productions do not count as European works, it will be important to follow what actions the US companies will undertake.

8.2.3.4. Local Acquisitions

The Department of Acquisitions usually focuses on content produced outside their television market. However, on occasion content produced in the same country but not originally commissioned by the channel is purchased. For example, 50.15% of the Children macrogenre on Channel 5 is scheduled with local programmes. However, this percentage is not entirely filled with programmes originally commissioned by the corporation. On the contrary, different programmes are acquired that have been produced to be aired initially by another broadcaster such as the Cartoon *Ben and Holly's Little Kingdom* whose first window was on Nickelodeon.

In the Spanish market, Atresmedia has acquired several Catalan Series which were originally commissioned by the public channel TV3. Recently, *Pulseres vermelles*[29] [*The Red Band Society*] (2011-2013), *Cites* (2015-present) (a local adaptation of the British Series *Dates* (Channel 4, 2013)) and *Merlí* (2015-present) have been aired in Antena 3 and La Sexta dubbed into Spanish. While they have been aired in Catalonia, according to the corporation the product is not too eroded to schedule on their general-interest channels. The first episode of *Merlí* aired on April 15, 2016 gained 7.7% of share in the Night slot of La Sexta (April 2016), considered to be a good result by the company (J. Iriarte, Atresmedia, April 16, 2016). Still, no other Series has been acquired from any other regional market showcasing the strength of TV3 in contrast to other public regional channels.

Another example is the presence of local Feature Films in the schedules of general-interest channels, remarkable in the Spanish schedules. While local titles can be purchased, the recent domestic titles aired are usually those which the corporations have invested in (MÁ. Morales, RTVE, January 22, 2016; J. Iriarte, Atresmedia, April 16, 2016). Most of these investments are due to the obligations established in the LGCA to invest a percentage of their profits (6% for the public channels and 5% for commercials) into producing local

[29] The Catalan Series was remade in the US market as *Red Band Society* and was broadcast on FOX (2014-2015).

content such as Feature Films (Article 5(3) LGCA). In the UK, while they do count towards local programmes in the classification used by this study, they would not count towards the British quota of original programming.

8.2.3.5. Diversity of origins as a public service remit

It is also important to highlight the differences of origin between the imported productions acquired by the public and commercial channels (Table 32). The first distinction, as previously stated, is the higher levels of European productions on the public channels. This difference is very pronounced in the Spanish market since this content occupies more than half of the time dedicated to imported productions on the public corporations while on commercial channels only 14.53% is allocated. Despite the lower level of EU content on latter broadcasters, it is higher than on both the British public (9.27%) and commercial channels (0.94%).

Regarding the presence of US programmes, Spain and the UK are in opposing positions. Commercial Spanish channels have a significantly greater amount of US content with 63.84% of their time dedicated to imports compared to the public broadcasters who only maintain 26.51%. In the UK, this figure is greater in the public channels with 79.47% compared to 70.90%.

The lower presence of US programmes on the British commercial channels is because of the presence of English-speaking productions from other countries. Commercial channels have a significant number of productions from English-speaking countries (excluding the US) at 22.22% and a lower level of co-productions between the US and these countries at 2.43%. Public channels only air co-productions with the US and other English-speaking countries (11.26%).

Table 32 - Origin of imported content separated by country and ownership. Season 2014-2015

		EU	US	US + EU	US + Others	US + OESC	Europe + Others	OESC	Others
SP	PUBLIC	**54.70**	**26.51**	**5.41**		**4.37**	**2.94**	**1.04**	**5.03**
SP	PUBLIC	UK 19.56 IT 10.73 DE 7.27 FR 5.18 AT 3.04 UK + FR + IT 1.99 DE + AT 1.71 IE 1.71 BE + FR 1.61 DE + UK 0.95 FR + DE 0.95		US + UK 4.18 US + FR 1.23		US + CA 2.28 US + AU 2.09	FR + CA + JP 2.94	CA 1.04	JP 2.09 KR 2.09 TR + EG + IN 0.85
SP	COMMERCIAL	**14.53**	**63.84**	**6.85**		**8.78**		**6**	
SP	COMMERCIAL	DE 12.98 UK 1.55		US + DE 2.13 US + DE + PY + UY 1.81 US + UK 1.55 US + UK + RU 1.36		US + CA 8.78		CA 4.13 AU 1.87	
UK	PUBLIC	**9.27**	**79.47**		**11.26**				
UK	PUBLIC	BE + NL 9.27			US + NO 11.26				
UK	COMMERCIAL	**0.94**	**70.90**	**1.96**		**2.43**	**1.56**	**22.22**	
UK	COMMERCIAL	IS 0.94		US + FR 1.96		US + CA 2.43	US + IN 1.56	CA 10.41 AU 9.39 AU + SG 1.64 NZ 0.78	

Overall, the main difference in the strategy between public and commercial channels is clearly the degree of diversity in the sources of the public broadcasters, opting to schedule content that is not present on the commercial channels. Nevertheless, it is important to see the dissimilarities between the Spanish public channels and the BBC, since the former aim for a significantly higher degree of diversity on their general-interest channels than the latter.

The Spanish public corporations, both state and regional, declare that content is chosen because of its interest, quality or volume, not because of its origin, a statement which is not shared with the commercial channels. Referring to La2, Morales commented: "In calling a slot *Versión Europea* [*European version*] I believe this implicitly indicates that we have the will to wager on that type of product, evidently. Yes, it has always been like this" (MÁ. Morales, RTVE, January 22, 2016).

The aim to broadcast European programmes, and more specifically non-commercial programmes, is to fulfil the public remit of airing minority content that people otherwise would not have access to. However, these types of programmes and Feature Films (referred to as Festival Films) are scheduled on La2, stating that La1 has a more commercial view and this brings American content to the schedule.

At the same time, according to the public regional channel TV3, content is not acquired because of its origin but only if it is appropriate and has good value. "I don't care where it comes from, Hong Kong or Europe or such, I don't care as long as it matches my content needs and price" (C. Blanch, CCMA, May 18, 2015). CCMA has agreements for Feature Films with the US majors but no US Series have been acquired recently.

In contrast, European Series have been acquired, especially French productions such as *Julie Lescaut* (TF1, 1992-2014) and *Joséphine, ange gardien* [*Joséphine*] (TF1, 1997-present). Another European Series scheduled on TV3 is the Austrian-Italian Series *Kommissar Rex/Il commissario Rex* [*Inspector Rex*] (Österreichicher Rundfunk, 1994-2004 & 2008-present)), which has been on the channel for many years. Despite currently not having any US Series, the European Series are scheduled in the Evening slot while the US Series are directly associated with the Prime time and Night slots. The latest titles aired were *Breaking Bad* (AMC, US, 2008-2013) and *Fringe* (FOX, US & CA, 2008-2013), which did not have high ratings on the channel (C. Blanch, CCMA, May 18, 2015).

Notwithstanding the low level of imported productions on the BBC main channels compared to the Spanish public broadcasters, the difference between markets in sources is important, especially with the dominant position of the US titles on both BBC One and

BBC Two (Table 33). Regarding Hypothesis 3, these results confirm that the Spanish public channels acquire imports from a higher diversity of countries than the commercial broadcasters. In the UK, the low proportion of imports on the BBC channels and the dominance of the US reject Hypothesis 3 for the generalist channels of our sample. (H3: "Public channels acquire their imported programmes from a wider variety of sources due to their public service obligations"). However, it has to be mentioned that the BBC positions its foreign language programmes on the portfolio channel BBC Four (Jensen & Waade, 2013).

Table 33 - Origin of imported content separated by channel. Season 2014-2015[30]

	EU	US	US + EU	US + Others	US + OESC[31]	EU + Others	OESC	Others
La1	34.08	51.13			14.79			
La2	67.51	16.07	2.20			5.25		8.97
Telecinco	25.26	25.26			27.37		22.11	
Cuatro	22.73	67.95	2.98				6.34	
Antena 3	5.50	69.43	18.65				6.42	
La Sexta		59.32	6.52		34.16			
TV3	46.95	16.67	29.10				7.28	
BBC One	43.75	56.25						
BBC Two		85.71			14.29			
ITV1		89.19			6.76		4.05	
Channel 4	89.94						10.06	
Channel 5	1.84	52.83	3.83	3.06	3.22		35.22	

8.2.3. Macrogenres and genres assumptions

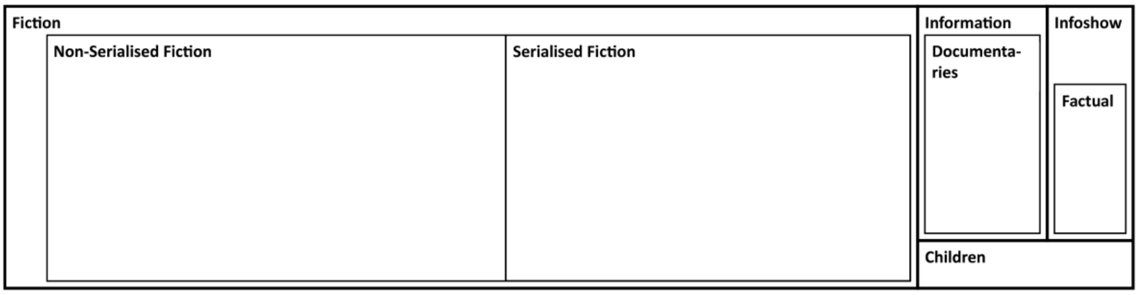
The general-interest channels in Spain and the UK import distinct macrogenres and, specifically, different genres. However, they share the same considerations on the value of the characteristics within each genre, which corresponds to the fourth and last glocal factor influencing the decision when selecting international content.

Fiction is the most acquired macrogenre in both cases, directly influencing the organisational chart of the departments, as previously stated. Furthermore, most of the executives in the acquisition departments are focused on the different Fiction genres. In Spain, the other macrogenres with imported content are Information, by way of

[30] List of country abbreviations – p.14.
[31] Other English-Speaking Countries.

Documentaries, and Infoshow, with Docuseries. In the UK, imports are found in the categories of Children and, to a lesser degree, Infoshow, which correspond to the Docuseries and Reality Game genres. The differences in the specific acquired genres can also be easily seen by the amount of time dedicated to discussing each macrogenre and genre during the interviews conducted with the Acquisitions Executives as Figure 11 illustrates.

Spain



UK

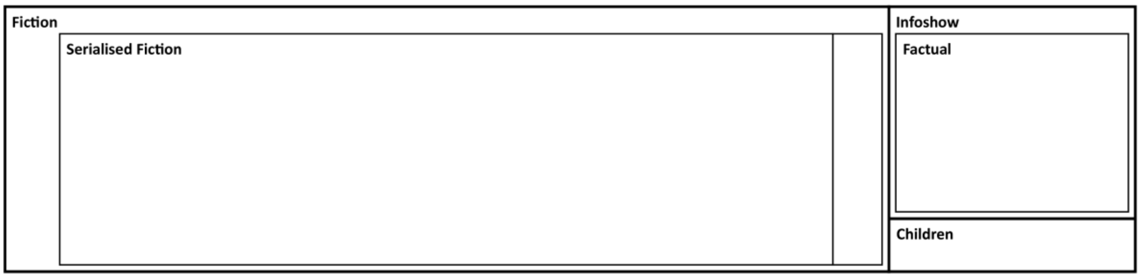
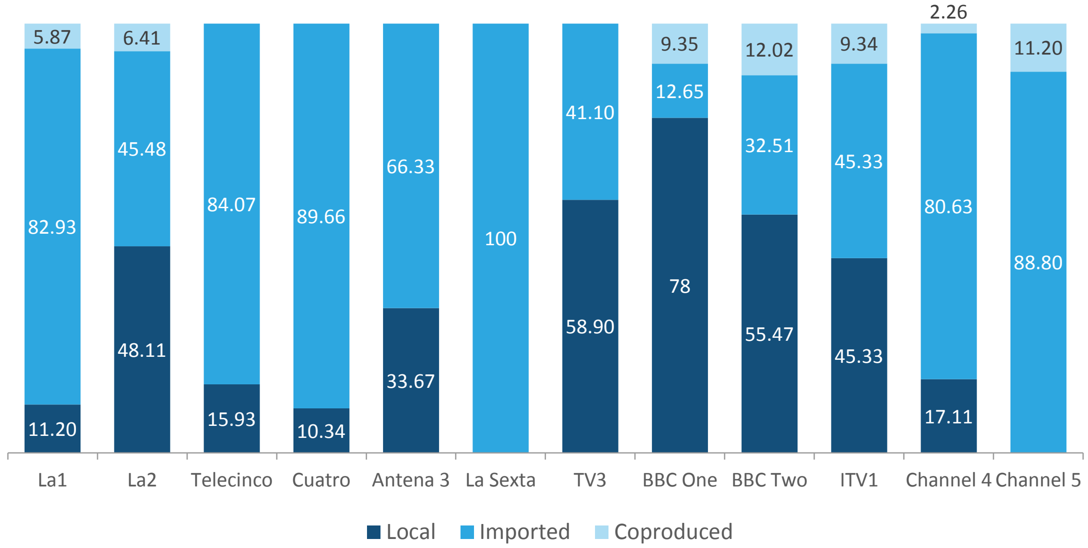


Figure 15 - Proportion of the macrogenres and genres commented on during the interviews
Source: author.

Since the aim of this dissertation is to analyse the acquisition process of imported content on television and, as a secondary purpose, to see how these programmes are scheduled, in this section we will delve into the reasons why these macrogenres are being acquired and the considerations that executives take when purchasing them. In addition, the general scheduling strategies distinguishing local and imported contents, and if this is the case, co-productions will be analysed.

8.2.3.1. Imported Fiction

Chart 15 - Fiction by types of production separated by channel. Season 2014-2015



As in the previous studies regarding international television flows (Havens, 2006; Lange, 2014), Fiction continues to be the most exchanged macrogenre across television markets. This category represents the highest volume of the scheduling sample dedicated to imports in both markets (SP, 68.56%; UK, 85.37%). In addition, the interviews were clearly marked by this macrogenre being the most discussed category in all cases.

Regarding the proportion of imports inside the Fiction macrogenre, these productions are 72.47% of the Fiction scheduling time in Spain while in the UK imported content reaches a slightly lower 63.52%, which corresponds to 8921 and 6100 minutes in the sample week. These imports are divided among all the Fiction genres: Feature Films, TV Movies, Series, Serials, Sitcoms, Mini-Series and Animation Series.

Table 34 - Fiction by types of production separated by slot and country. Season 2014-2015

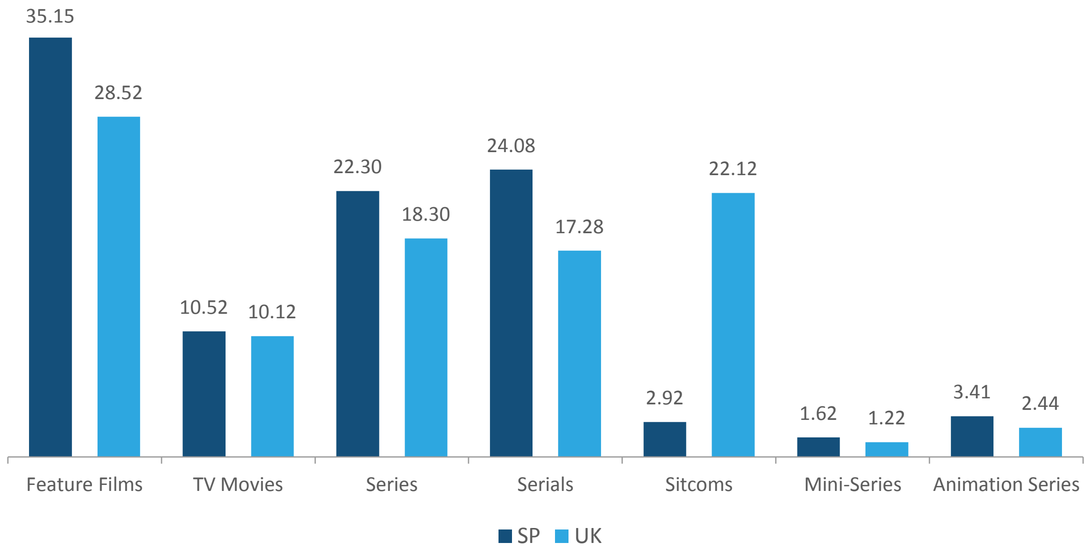
		Morning	Midday	Afternoon	Evening	Prime Time	Night
SP	**Local**	19.64	35.88	23.80	22.74	42.65	25.34
	Imported	80.36	64.12	76.20	74.37	51.19	72.25
	Co-produced				2.89	6.16	2.41
UK	**Local**	6.02	20.67	23.79	81.70	61.58	10.75
	Imported	93.98	79.33	72.86	5.78	31.38	65.59
	Co-produced			3.35	12.52	7.04	23.66

As a general analysis, Fiction is scheduled across all the slots in both countries (Table 34). In Spain, more than half of the time in all slots dedicated to this macrogenre is apportioned to imports. This includes Prime Time, although this being the slot with the lowest proportion of imports at 51.18%. In the UK, the amount of acquired Fiction is considerably lower in the Evening (5.78%) and Prime Time (31.38%) where there is a greater concentration of local Fiction programmes. It is also worth noting that there is a higher level of local Fiction during the weekdays in both countries while at the weekend the percentage of imports rises considerably, especially in Spain (weekdays, 64.29%; weekend, 90.98%) but also in the UK (weekdays, 60.16%; weekend, 71.71%).

As previously stated, it is possible to differentiate between Non-Serialised Fiction (Feature Films and TV Movies) and Serialised Fiction (Series, Serials, Sitcoms, Mini-Series and Animation Series). This distinction is important for two main reasons. Firstly, the production routines of programmes affect the scheduling logics of the channels: scheduling a Feature Film is not the same as a Series of 22 episodes in just the first season. Secondly, the genre conditions where those programmes are bought. While Non-Serialised Fiction is currently the most strategic in Spain in terms of acquisitions (MÁ. Morales, RTVE, January 22, 2016; J. Iriarte, Atresmedia, April 16, 2016; C. Blanch, CCMA, May 18, 2015), Serialised Fiction is still highly significant in the British market, particularly on Channel 4 and Channel 5, despite the increase in the platforms broadcasting this type of content.

In the following sections, the specific characteristics of each category and genre will be discussed beginning with Non-Serialised and ending with Serialised genres.

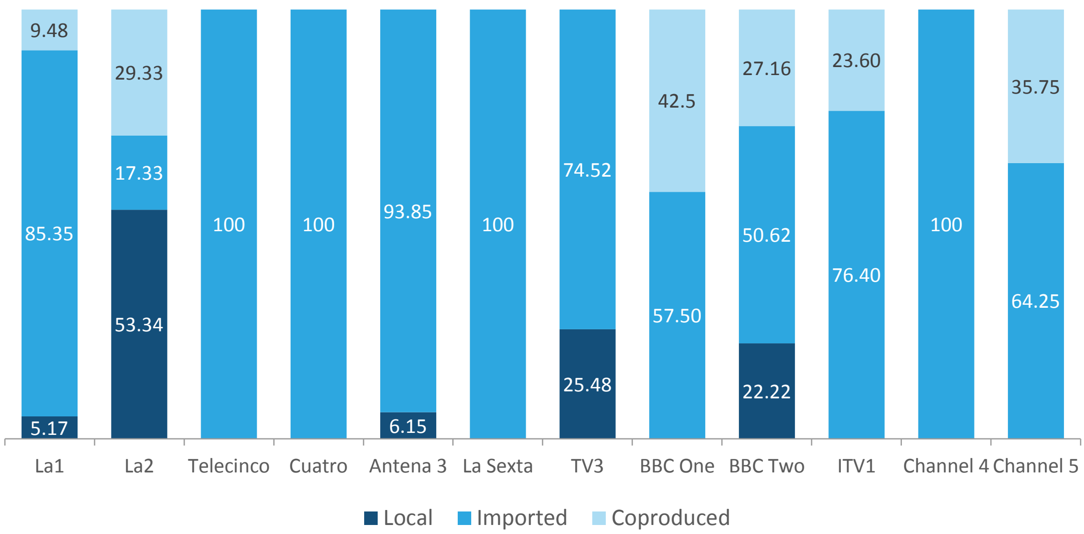
Chart 16 - Fiction genres separated by country. Season 2014-2015



8.2.3.1.1. Non-Serialised Fiction

Non-Serialised Fiction is exceeded by Serialised programmes in both markets. However, in the Spansih market 45.67% of the time is dedicated to the macrogenre, which is higher than in the UK where this content only reaches the 32.64%. Within Non-Serialised programmes, Feature Films clearly dominate in both cases (SP, 35.15%; UK, 28.52% of the Fiction macrogenre). Furthermore, in both cases it is the most present Fiction genre. This category is scheduled across the whole day but the slot most commonly allocated in Spain as well as in the UK is Night (SP, 24.14%; UK, 27.48% of the slot). Another similarity is that most titles are scheduled during the weekend in both markets (SP, 54.23%; UK, 76.11%).

Chart 17 - Feature Films by types of production separated by channel. Season 2014-2015



Feature Films genre is a category broadly imported across all the sample and acquisitions represent 83.24% in Spain and a lower 66.67% in the UK. However, it is worth mentioning the 26.92% of co-produced Feature Films aired in the latter country, all of them released with the US. In contrast, the level of co-productions in Spain is 5.09%, done with another European country, France and Poland, or with the Spanish-speaking country Mexico. In terms of channels, La2, of the public RTVE, is the only channel with a majority of local productions (Chart 17). However, all the local titles aired correspond to old productions.

Feature Films have always been an important part of Spanish general-interest channels, more frequently on the public corporation and Antena 3 than Telecinco, the market leader. “There are seasons that Telecinco does not broadcast cinema because it is a channel focused on another type of scheduling” (Á. López, Mediaset, June 9, 2015). Another reason for Telecinco not having a significant quantity of Feature Films is that acquiring this genre was too expensive in relation to the audience results delivered. However, with the current audience fragmentation, better audience results can be achieved when compared to their average share making it is easier to amortise the price. Furthermore, the economic crisis has forced Spanish channels to negotiate harder with distributors causing Feature Films to be cheaper than in previous seasons (C. Blanch, CCMA, May 18, 2015; MÁ. Morales, RTVE, January 22, 2016; J. Iriarte, Atresmedia, April 16, 2016).

In the British market, Channel 5 is the only corporation that highlights the importance of Feature Films on their main channel (31.33% of the Fiction macrogenre) and their portfolios: “we buy across the portfolio 5203 hours of Movies across the portfolio. So they are incremental to our business and our performance” (MC. Dunlop, Channel 5 Corporation, July 6, 2015). Regarding ITV1, Feature Films absorb 39.56% of the time dedicated to Fiction. According to the executive, only big franchises are acquired for the main channel such as *James Bond, Harry Potter* or *The Minions.* However, during the sample *Coogan’s Bluff* (US, 1968), *Fletch Lives* (US, 1989) and *Twister* (US, 1996), all library titles, were aired partly contradicting the statement.

Table 35 - Origin of imported Feature Films separated by country and ownership. Season 2014-2015[32]

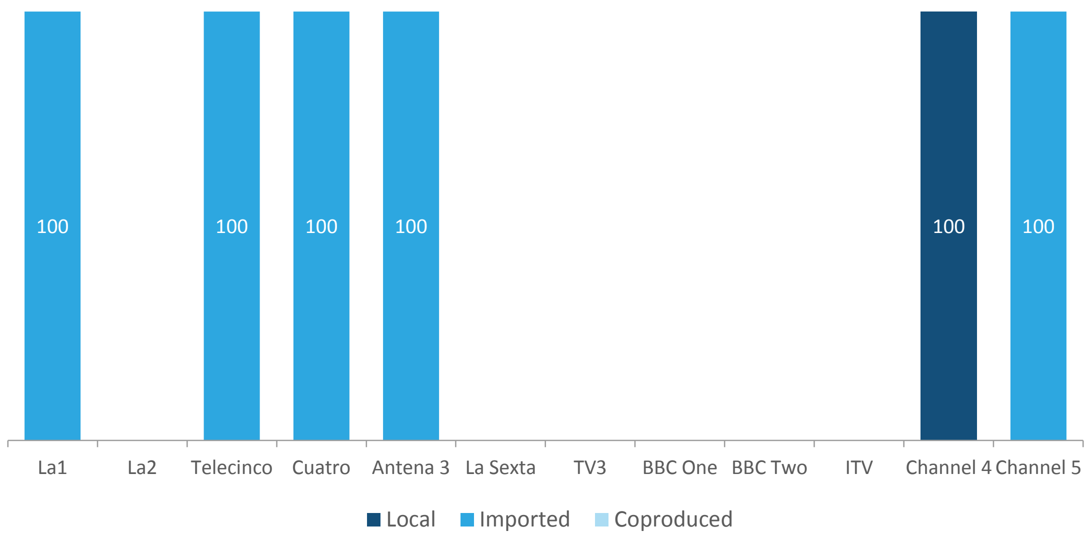
		EU	**US**	**US + EU**	**US + Others**	**US + OESC[33]**	**EU + Others**	**OESC**	**Others**
SP	**Public**	17.54	57.71	17.86		6.89			
	Commercial		73.57	26.43					
UK	**Public**	13.33	70.48			16.19			
	Commercial		90.71	9.29					

In both markets, Feature Films is the genre with the highest diversity of sources of imported content due to the great variety of titles in the schedules. Nevertheless, the hegemonic position of the US in the local movie theatres is translated into the schedules of television broadcasters. As can be seen in Table 35, the dominance of the US is apparent, not only with the content produced solely within this market, but also with the co-productions between the US and other countries. In fact, the commercial channels of both countries only broadcast imported Feature Films sourced from the US during the sample week analysed including co-productions between the US and EU and the US and other English-speaking countries.

[32] List of country abbreviations – p. 14.
[33] Other English-Speaking Countries.

In contrast, public channels also broadcast European Feature Films attaining 17.54% of the time allocated to the genre in Spain and 13.33% in the UK. Nevertheless, US titles are also clearly dominant (Table 35).

Chart 18 - TV Movies by types of production separated by channel. Season 2014-2015



The second Non-Serialised Fiction genre is TV Movies. Its presence in the schedules is significantly lower than Feature Films attaining a similar proportion of 10.52% and 10.12% of the Fiction time in Spain and the UK, respectively. However, while in Spain the genre is entirely imported from other television markets, there is a significant amount of local TV Movies in the latter market at 31.37% of the genre. While these productions are rarely produced locally in Spain, there is a greater tradition of locally commissioning these titles in the UK. The channels purchasing TV Movies are La1, Antena 3, Telecinco, Cuatro and Channel 5.

According to the Atresmedia executive, Antena 3 was the first channel in Spain to begin acquiring TV Movies after the dismantling of the public monopoly (J. Iriarte, Atresmedia, April 16, 2016). It was decided to schedule this genre in order that the channel was more prominent against their competition. The strategy was a success in view of the fact that after more than a decade, this content is still significant to this channel and has spread into two more general-interest channels: La1, and to a lesser extent, Telecinco. Currently, Antena 3 is broadcasting six TV Movies each weekend while the main public channel, La1, also broadcasts two on Saturdays and three on Sundays (MÁ. Morales, RTVE, January 22, 2016). Mediaset is the Spanish corporation that only broadcasts TV Movies occasionally.

It is argued that the success of TV Movies in the Spanish market is due to the genre being entirely considered as for television. Thus, this influences production regarding the rhythm of the storyline, which usually presents an initial conflict to generate immediate viewer interest, and aesthetics such as the illumination to improve quality on a smaller screen. Furthermore, another engaging aspect is that a number of these titles are based on real events. Also, all are aimed at a more feminine audience with most of the titles having a woman in the main role with the topic 'woman in jeopardy' (J. Iriarte, Atresmedia, April 16, 2016).

This praise of the TV Movie genre contrasts with the lack of local productions in the Spanish market. While they are considered an audience success, this genre is only scheduled in the Afternoon and Evening slots and usually only during the weekend (65.25%). This is also when other general-interest channels are airing imported content such as TV Movies or second-tier Feature Films. However, this trend is slightly reduced in the sample week due to the unusual scheduling in the Afternoon and Evening slots of La1 instead of its usual local Serials, as previously mentioned. The only channel that does not schedule imports at that time is Telecinco, the leader of the market. Their most prominent macrogenre, Infoshow, is aired instead. Thus, imported TV Movies are profitable and able to reach a significant part of the market because they are scheduled in these less competitive slots and are acquired for a modest investment.

Table 36 - Proportion of TV Movies in each slot separated by country. Season 2014-2015

	Morning	Midday	Afternoon	Evening	Prime Time	Night
SP			5.01	11.67	0.51	0.47
UK	0.79	1.74	5.49		1.14	

This genre has an extremely specific programming strategy where titles tend to be scheduled during the weekend and in non-peak time hours. The slot with the greatest volume of TV Movies in Spain is the Evening (11.67% of the time of the slot) followed by the Afternoon (5.01%). In the case of the UK, the majority of TV Movies are broadcast in the Afternoon (5.49%). However, there is a clear difference in this market between local programmes and imports. First, it should be stated that while local TV Movies were aired on Channel 4, imports were broadcast on Channel 5. Acquired TV Movies are entirely scheduled in the Afternoon while local productions are distributed across the entire day except the Night slot. This displays that while imported TV Movies have a secondary role in the schedules, the scheduling of local titles is more important, including at Prime Time.

Table 37 - Origin of imported TV Movies by country. Season 2014-2015[34]

	EU	US	US + EU	US + Others	US + OESC[35]	EU + Others	OESC	Others
SP	50.96	8.11			16.22		24.71	
UK		20			20		60	

As previously described, the quantity of US TV Movies was insufficient to meet the needs of the Spanish generalist channels which obliged the channels to search for titles in other markets, especially Germany. In the sample week, German TV Movies are 44.01% of the genre, while US imports only hold 8.11% plus the 16.22% of co-productions between the US and other English-speaking countries, in this case, Canada. The US-only productions are also surpassed by Canada with 24.71% of the time. The other European market present is Austria which co-produces titles with Germany.

In the UK, Channel 5 only imports English language content. Specifically, Canada is the country where most content is imported from at 60% of time allocated with the remaining 40% divided between US content and co-productions produced by the US and Canada (Table 37).

Scheduling of Non-Serialised Fiction

There is a significant difference between the scheduling strategies of Spain and the UK when programming Non-Serialised Fiction. These genres are characterised as being a one piece content since, despite some Feature Films and TV Movies having different parts, they can always be scheduled on their own. Thus, this distinctiveness makes it difficult to predict and stabilise the ratings. On the whole, this is because not all Non-Serialised Fiction programmes aired on each channel are aimed at the same target. "In the Movie slots one day you put an action Film, one day you put *My best friend's wedding*, then... clearly, you will never have the same audience" (J. Iriarte, Atresmedia, April 14, 2016).

In Spain, in contrast to the UK, all channels try to counteract this and build loyalty in the audience for their Feature Films and TV Movies by creating containers. A container is a fixed slot in the schedule with a specific name to group weekly broadcasts of a genre. Since

[34] List of country abbreviations – p. 14.
[35] Other English-Speaking Countries.

not all Feature Films have the same quality and appeal, Film containers help channels to stabilise a brand. During the sample week, 55.46% of the time dedicated to Feature Films and TV Movies in Spain was broadcast inside a container (Table 38).

Table 38 - Containers of Non-Serialised Fiction on Spanish channels

	Container	Percentage on the Feature Films genre	SLOT
La1		**40.01**	
	Versión Española	3.48	Night
	Cine de Barrio	6.38	Evening / Prime Time
	Sesión de tarde	24.35	Afternoon / Evening
	Cine para todos	5.80	Morning
La2		**76**	
	El cine de La2	46.67	Prime Time / Night
	Versión Española	29.33	Prime Time / Night
Telecinco		**38.10**	
	Cine en familia	38.19	Afternoon
Cuatro		**100**	
	El Blockbuster	23.08	Night
	Home Cinema	76.92	Afternoon / Evening
Antena 3		**64.31**	
	El peliculón	17.25	Prime Time / Night
	Multicine	47.06	Afternoon Evening
La Sexta		**27.03**	
	El Taquillazo	27.03	Night
TV3			
	La Gran Pel·lícula (not reflected in the sample week)		Night

Each Film container has its own requirements and the intent is to create a surrounding brand easily identified by the viewers. For example, *El Peliculón* of Antena 3 is aired on Saturdays and Sundays during the Prime Time and Night slots which, according to the executive, is reserved for the initial release of a Film on free-to-air television or for very well known titles (J. Iriarte, Atresmedia, April 16, 2016).

In the sample week, the two Feature Films aired in this container were *Stolen* (US, 2012) and *Nights in Rodanthe* (US & AU, 2008, adaptation of the bestseller by Nicholas Sparks). Another example of the kind of movies scheduled in this slot is the premiere of the Film *John Wick* (US, 2014) directly onto the channel with no theatrical release in the country (only a short holdback from Netflix). Overall, "*El peliculón* is synonymous with blockbuster" (J. Iriarte, Atresmedia, April 16, 2016). In contrast, the other container from

Antena 3, *Multicine*, is reserved for old Films or second-tier Feature Films and TV Movies. This slot is mainly broadcast during the Afternoon and Evening slots.

Most containers on the other channels are reserved for broadcasting blockbusters. This is the case with *La película de la semana* (La1), *El blockbuster* (Cuatro), *El taquillazo* (La Sexta) and *La gran pel·lícula* (TV3). The market share expectation for all these slots is high due to the price and quality of the scheduled titles.

> The median share of the channel La1, for example, was around 10% in 2005. The median of the *La película de la semana* was 13.9-14. That is nearly 4 points above the average of the channel. So it is a very important in terms of audience (MÁ. Morales, RTVE, January 22, 2016).

Additionally, it is interesting to evaluate a number of the Film containers at the Spanish public corporation RTVE such as *Versión Española* [*Spanish Version*], *Cine de Barrio* [*Cinema of the Neighbourhood*] and *Versión Europea* [*European Version*]. These slots aim to highlight and promote Spanish and European productions and aim to fulfil its public service remit with these containers.

The importance of Feature Films in the Spanish schedules is also supported by another scheduling technique highlighted by some of the sample executives. Channels take advantage of the theatrical releases of sequels of the Feature Films they have the rights to broadcast on their channels. As an example, the executive from Atersmedia talks about the release of the Film *Batman v Superman: Dawn of Justice* (US, 2016) and how they took advantage by scheduling most of the Movies about these two superheroes to which they had the rights during the advertising campaigns (*Man of Steel* (US, CA & UK, 2013), *The Dark Knight* (US & UK, 2008), *Batman Begins* (US & UK, 2005), *Superman Returns* (US, 2006)). “It always helps because people are more receptive” (J. Iriarte, Atresmedia, April 16, 2016).

8.2.3.1.2. Serialised Fiction

Serialised Fiction occupies a dominant position in the time dedicated to Fiction. Series, Serials, Sitcoms, Mini-Series and Animation Series reach 54.33% of the macrogenre in Spain while in the UK this proportion rises to 61.36%. Prior to examining each of the genres, some general considerations have to be highlighted. First, the high presence of these programmes on a wide range of platforms has saturated both markets, especially the Spanish, which influences the decisions of Acquisitions Executives. Second, the digitalisation of content has influenced the scheduling strategies of local corporations in order to prevent the erosion of the programmes.

The expansion of Serialised Fiction

Serialised Fiction is highly important in the UK market, both on the portfolio and pay-TV channels but also on the general-interest channels. In particular, imported Serialised Fiction is especially central to Channel 4 and Channel 5, the two channels with the lowest market share and that commission the fewest local products. In contrast, in Spain the appeal for these kind of genres has diminished in recent years after the period coinciding with the launch of the two newest general-interest channels Cuatro in 2005 and La Sexta in 2006.

During the early years of these channels, scheduling Serialised Fiction, mainly Series and Serials, was something new and very successful. Soon, the rest of the generalist channels, excluding Telecinco, tried to follow the same strategy of acquiring US titles. “It was cool and young to watch Series” (Á. López, Mediaset, June 9, 2015). However, channels have tried to switch their strategy away from the focus of imported Serialised Fiction because it is considered that “it is not as demanding as it was a few years ago” (J. Iriarte, Atresmedia, April 16, 2016).

Spanish commercial corporations comment that currently only a few imported Series manage to be successful, especially in Prime Time, and these titles are basic procedural Series (J. Iriarte, Atresmedia, April 16, 2016 and Mediaset). While Cuatro has altered its strategy to local Infohsow programmes, it continues to be the channels with the highest n amount of imported Series with the titles *CSI* (CBS, US, 2000-2015), *Criminal Minds* (CBS, US, 2005-present) and *Castle* (ABC, US, 2009-2016) in Prime Time. In addition, reruns are scheduled of the US Series *Hawai Five-0* (CBS, US, 2010-present) and *Castle* in the Afternoon and Evening slots.

As happens with Cuatro, in the British market Channel 4 and especially Channel 5 also depend on imported Serialised Fiction to shape the image of their brand. Despite local commissions making up the majority of the general schedule at Channel 4, the executive comments that a small number of key acquired Series remain very important to the brand of the main channel. *Fargo* (FX, US, 2014-present) and *Homeland* (Showtime, US, 2011-present) were highlighted (K. Ames, Channel 4 Corporation, November 25, 2015). In the case of ITV, there are no imported Prime Time Series on the main channel because ratings are lower than with local productions, which is approximately five to eight million viewers (S. Breslau, ITV, September 16, 2015).

In general terms, two main reasons have been proposed for the reduction in the appeal of imported Serialised Fiction on the general-interest channels in both markets, although to a greater degree in Spain. Firstly, the proliferation of titles has saturated the market and viewers can currently watch both local and imported programmes on a variety of channels. The lower market shares of portfolio channels have led to many being broadcast there instead of on the main channels because it is easier for these programmes to be successful. As an example, ITV1 was scheduling the old police Series *Murder, she wrote* (CBS, US, 1984-1996) across the Midday and Afternoon slots of the weekend during season 2014-2015. In the interview, the executive commented that in the following season they are now broadcasting it via ITV3. “That is no longer on ITV1, but it is on ITV3 because it works for ITV3 but it didn’t work for ITV1” (S. Breslau, ITV, September 16, 2015).

Furthermore, the corporations who own the generalist channels also have portfolio channels mostly dedicated to imported Serialised drama and comedy. These products play a higher role on the portfolio channels bringing more prestige and awareness than on the main channels, as with E4 where the Channel 4 Corporation schedules their most successful acquisitions (K. Ames, Channel 4 Corporation, November 25, 2015).

Another example is Atresmedia where imported Sitcoms, a genre not present on the general-interest channels of Spain, are broadcast on the Neox channel. In addition, recently an HD channel exclusively for Series called Atreseries was created (December, 2015). In this case, Series exclusively for the channel were not purchased, instead, the existing rights to imported and local Series were amortised. However, some exceptions were made by purchasing Mini-Series from HBO (*Olive Kitteridge* (US, 2014) and *Mildred Pearce* (US, 2011)) to build a positive brand image for the channel.

The second reason for the decrease in appeal of Serialised Fiction is that Series, Serials, Mini-Series and Sitcoms are the distinctive assets of the new VoD platforms and pay-TV channels and use them to differentiate their brand from competitors. Furthermore, these platforms acquire longer holdbacks for their programmes to block content from being acquired by general-interest channels.

The Atresmedia executive explained the effect of this practise on the exhibition windows of *Game of Thrones* (HBO, US, 2011-present) in the Spanish market. The corporation acquired the rights for the highly successful Serial to broadcast on La Sexta. However, Movistar, the most important pay-TV platform, had already aired the programme and had a one-year holdback. The broadcast on La Sexta was a ratings disaster and, in the opinion of the channel, this was because everybody interested in the show had already watched it (J. Iriarte, Atresmedia, April 14, 2016).

While the competition to acquire Serialised Fiction was fierce as recently as five years ago, generally corporations are now more careful with their acquisitions for the main channels but particularly for these genres, especially for programmes that would be aired in competitive hours. If a Feature Film or a TV Movie is acquired and is not successful, channels only have a low number of runs left, as will be seen. In contrast, a minimum of the complete first season is acquired for Series, which is usually twenty-two episodes for US Series or slightly fewer for European content. Therefore, if a Series is not successful, the loss for the channel is greater (Á. López, Mediaset, June 9, 2015).

The scheduling strategies of Serialised Fiction

The availability of audiovisual content online, legally or illegally, has greatly affected the broadcasting of Serialised Fiction by the traditional broadcasters. Firstly, the time between the airing in the original market and the local market is crucial to reduce viewing on other platforms. Thus, channels are trying to broadcast as closely to the original as possible. However, this is challenging since not all television markets have the same television seasons, breaks or scheduling techniques.

In the case of the UK, content is not usually dubbed. However, episodes from US shows are not aired too close to the first broadcast because the British market has fewer breaks within the season than the Americans.

> So we normally say, their schedule starts from September and maybe we wait until the end of October, mid October, so at least 4 weeks behind so we can always have a continuous run of the show as opposed as taking one night break. There are benefits to going so close to transmission in the US but really it is not worth it sometimes if you have to break all the time. I think our audiences in the UK are not used to it as much as in the US (MC. Dunlop, Channel 5 Corporation, July 6, 2015).

Concerning Spain, the problem with broadcasting close to the original run, considering the time needed for dubbing, is that at least two episodes of the same Series are broadcast in the same night, one after the other. Spanish audiences are accustomed to longer episodes of television Series and programmes lasting for approximately sixty minutes in contrast to the forty that US shows last. In addition, they only watch one show per night, not two different programmes. "Usually if you schedule one episode, people leave you. There is no way to link people with the next Series or with the next programme shown. They leave you" (Á. López, Mediaset, June 9, 2015). Thus, this requires a delay until there are sufficient episodes of a Series to be able to schedule two per night once a week with no breaks between weeks.

8.2.3.1.2.1. Series versus Serials

Series (SP, 22.30%; UK, 18.30%) and Serials (SP, 24.08%; UK, 17.28%) fill a similar amount of the total Fiction scheduling time in both countries, being the two main Serialised Fiction genres. In this section, Series and Serials will be analysed concurrently in order to compare and highlight their similarities and differences.

The level of continuity in the storyline between episodes is the main differentiation between Series and Serials. While Series have self-contained episodes, Serials have story arcs that last across one or more seasons. This aspect requires different levels of loyalty from the viewers. The episodes of Series can be followed independently and with no necessity to watch them all or in a particular order. By contrast, Serials demand more consistency from the viewer. Thus, this also suggests that this genre requires different scheduling techniques, especially in terms of the reruns. While self-contained episodes repeat particularly well, it is harder to schedule the second run of Serials (MÁ. Morales, RTVE, January 22, 2016; J. Iriarte, Atresmedia, April 16, 2016; K. Ames, Channel 4 Corporation, November 25, 2015; MC. Dunlop, Channel 5 Corporation, July 6, 2015).

These differences entail that channels have their preferences in acquiring either imported Series or Serials according to the needs of their schedules. However, in general terms there is the concept that imported Series work better and, in contrast, local Serials generate more loyalty in the viewers and achieve better ratings. As an example, Channel 5 acquired the Australian Serial *Secrets and Lies* (Network Ten, 2014), which was a success in its original market. Furthermore, it was similar to another Australian Series acquired by the channel, *Wentworth* (Sotto, 2013-present), with good ratings. However, the Serial *Secrets and Lies* did not succeed which the executive from the corporation links to the high level of continuity between episodes. Interestingly, the local adaptation of the same Serial by the BBC was a success. Thus, channels prefer to import Serialised Fiction with self-contained episodes.

The only exception to this unwritten rule is Channel 4 that, while having some Series in its schedule, prefers Serials for their main channel, especially for Prime Time and for their key acquisitions. As seen previously, the two imported shows highlighted as being defining for their channel brand were two Serials: *Homeland* (Showtime, US, 2011-present) and *Fargo* (FX, US, 2014-present).

Chart 19 - Series by types of production separated by channel. Season 2014-2015

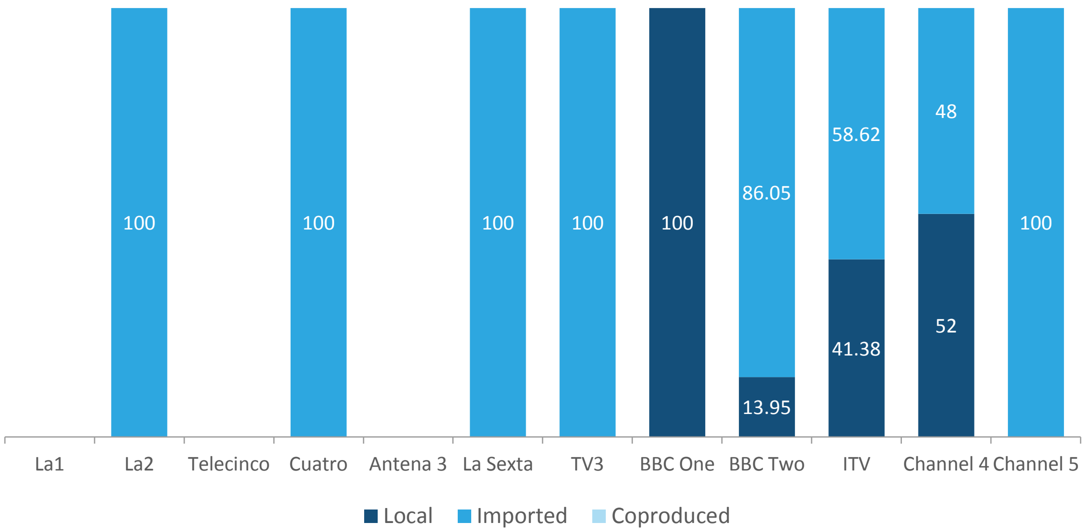
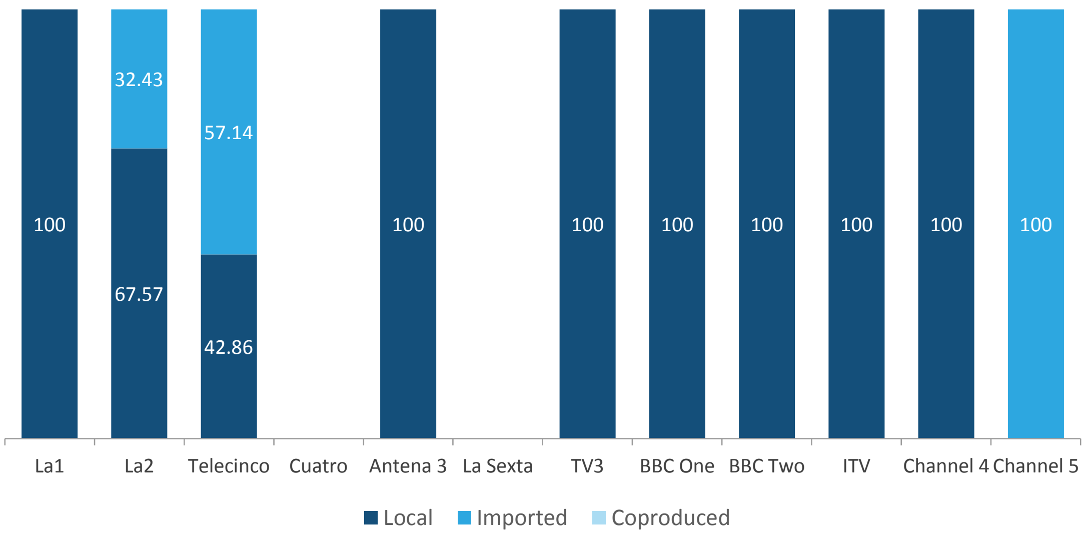


Chart 20 - Serials by types of production separated by channel. Season 2014-2015



The preference for imports with auto-conclusive episodes and a continuous story arc for local Serialised Fiction is reflected in the types of productions encountered in the sample week in Series and Serials. In the Spanish market, all Series are imported while 84.58% of Serials are local. On La1, Antena 3 and TV3 all the scheduled Serials are local, highlighting the strategic role of Fiction for these channels, whereas the only two with imported Serials are La2 with 32.43% of the genre and Telecinco with 57.14%.

In the British market, 78.06% of Series are also imported which is a higher proportion than Serials at 35.31%. Furthermore, four of the channels acquire imported Series (BBC

Two, 86.05%; ITV1, 58.62%; Channel 4, 48%; and Channel 5, 100%) whereas only Channel 5 schedules imported Serials (100%) (Charts 19 and 20).

The imported Series scheduled in the British market in Prime time and Night have different characteristics from those aired during Day Time. Most of the peak-viewing time titles are recent Series and the majority of the episodes aired are first runs on the channel. On the contrary, the Series scheduled in the other slots were reruns of different programmes. Concerning this latter category, one characteristic of the British market is that considerably older Series, and Sitcoms as will be seen, are aired on most channels. For example, BBC Two aired the American show *Cagney and Lacey* (CBS, US, 1982-1988), ITV1 scheduled *Murder, she wrote* (CBS, US, 1984-1996) and Channel 5 aired *Columbo* (US, NBC, 1968-1978; ABC, 1989-2003) during the sample week.

Similarly, two types of local Serials are encountered in both countries with different scheduling strategies: long running Serials (soap operas) and the Serials of Prime Time/Night that have less seasons and fewer episodes. However, in the UK daily Serials like *Coronation Street* (ITV1, 1960-present), *Eastenders* (BBC One, 1985-present) and *Hollyoaks* (Channel 4, 1995-present) are scheduled in the Evening and Prime Time slots whereas in Spain, these productions are scheduled in the Afternoon and early Evening slots. Another difference between the markets is that while the Spanish channels only broadcast their local Serials on weekdays, British channels also schedule Prime Time and Night local Serials during the weekend.

Table 39 - Serials by slots separated by type of production and country. Season 2014-2015

	SP			UK		
	Local	**Imported**	**Co-produced**	**Local**	**Imported**	**Co-produced**
Morning	69.23	30.77				
Midday	100			25.00	75.00	
Afternoon	100			21.88	78.12	
Evening	81.40	18.60		100		
Prime Time	25.00	75.00		100		
Night	100			100		

Regarding the origin of the imported titles, the power of the US market is found to be very strong when imported Series are analysed. Furthermore, it is the only territory that the UK acquires from and also surpasses other sources by a large majority (64.99%) in Spain. Additionally, if we look at the Series scheduled in the Night slot, the most competitive in this genre in the country, all are sourced from the US.

In the other less competitive slots for Fiction in Spain, there are productions from three other European countries (Germany, 26.47%; Italy, 3.52%; France, 3.18%) and Canada (1.84%). The Italian and French productions are aired on the Spanish public channels La2 and TV3 while the German Series *Alarm für Cobra 11 – Die Autobahnpolizei* [*Alarm for Cobra 11 – The Highway Police*] (RTL Television, 1996-present) and *Der letzte Bulle* [*The Last Cop*] (Sat.1, 2010-2014) are scheduled on Cuatro during the Morning slot of weekdays. These results highlights the fact that there is a clear distinction in the Spanish market between the Series for the Night slot, considered Prime Time by channels for marketing reasons, and Day Time, which allows titles with different origins.

While the domination of the US was very clear in the Series genre, surprisingly, there is no content from this market in the Serials genre. In the case of the UK, the two imported Serials scheduled on Channel 5, *Home and Away* (AU, Seven Network, 1988-present) and *Neighbours* (AU, Seven Network, 1985; Network Ten, 1986-2010; Eleven, 2011-present), are purchased from Australia. Since this channel does not have domestic Fiction, these shows are aired in order to build audience loyalty due to their similarity to the local Serials *Eastenders* and *Coronation Street* aired on BBC One and ITV1, respectively.

In Spain, two acquired Serials were broadcast during the sample. The public channel La2 aired the Italian production *Un passo dal cielo* (Rai1, 2011-present) across the Evening and Prime Time slots, while Mediaset aired the British show *The Paradise* (BBC One, 2012-2013) on Telecinco in the Morning slot of the weekend.

8.2.3.1.2.2. Other Serialised Fiction genres

The other genres within Serialised Fiction, Sitcoms, Mini-Series and Animation Series, will be displayed in this section. The three categories have a secondary position in Spain; however, in UK Sitcoms represent a significant proportion of the time dedicated to Fiction (22.12%) surpassing the level of Series.

Humour is a strongly localised genre, however, some Sitcoms have managed to cross borders and have been a success in foreign markets. Nevertheless, acquisitions of this type of content are usually pushed onto the portfolio and thematic pay-TV channels rather than on the generalist channels. Only one corporation in the sample opts to incorporate imported productions of this genre into the schedule of their main channel, Channel 4. Since they aim at a younger audience, this genre is very connected to their viewers.

In general terms, Sitcoms represent 2.92% of the Fiction scheduled in Spain and a significantly higher 22.12% in the UK. This category has not been traditionally scheduled in Spain and when they have been successful, the episodes are usually longer than the usual 20 minutes for the genre and similar to Series and Serials (i.e. *Aquí no hay quien viva* (Antena 3, 2003-2006), *7 vidas* (Telecinco, 2005-2014), *Aída* (Telecinco, 2005-2014), etc.). The tradition is much more established in the UK, which shows with its position as second most present Fiction genre after Feature Films (28.52%).

In the sample the channels airing Sitcoms are Cuatro, BBC and Channel 4. The only Sitcom in Spain during the sample is a local show, *Gym Tony* (2014-2016), broadcast in Prime Time of Cuatro after the News and before the main programme of the Night. In the UK, all titles scheduled on BBC Two are local while on Channel 4 they are imported and are aired in the Morning, Midday and Night slots.

All imported Sitcoms are acquired from the US. While a number of the shows are the US latest successes such as *The Big Bang Theory* (CBS, US, 2007-present) and *Brooklyn Nine-Nine* (FOX, US, 2013-present), reruns of old Sitcoms are scheduled in the Morning slot such as *3rd Rock from the Sun* (NBC, US, 1996-2001), *Everybody Loves Raymond* (CBS, US, 1996-2005), *Frasier* (NBC, US, 1993-2004), *The King of Queens* (CBS, US, 1998-2007) and, the most recent, *How I Met your Mother* (CBS, US, 2005-2014). “In the morning slot people don’t expect hard hitting content, they just want something light and entertaining and those shows lend themselves to that kind of viewing. So traditionally those kind of shows have worked well on those slots” (K. Ames, Channel 4 Corporation, November 25, 2015).

In the case of Mini-Series, this is the Fiction genre with the lowest share in both Spain and the UK. More precisely, it fills merely 1.62% and 1.22% of the macrogenre, respectively. The channels airing Mini-Series are La2, Telecinco, ITV1 and Channel 4. While in Spain all the titles are imported, in the UK those on ITV1 are local programmes and those on Channel 4 are co-produced. Regarding the imported Mini-Series in the Spanish market, La2 aired the Italian title *L’olimpiade Nascota* (Rai 1, 2012) and Telecinco scheduled *The Kennedys* (History Television, 2011), which was produced by the US and Canada.

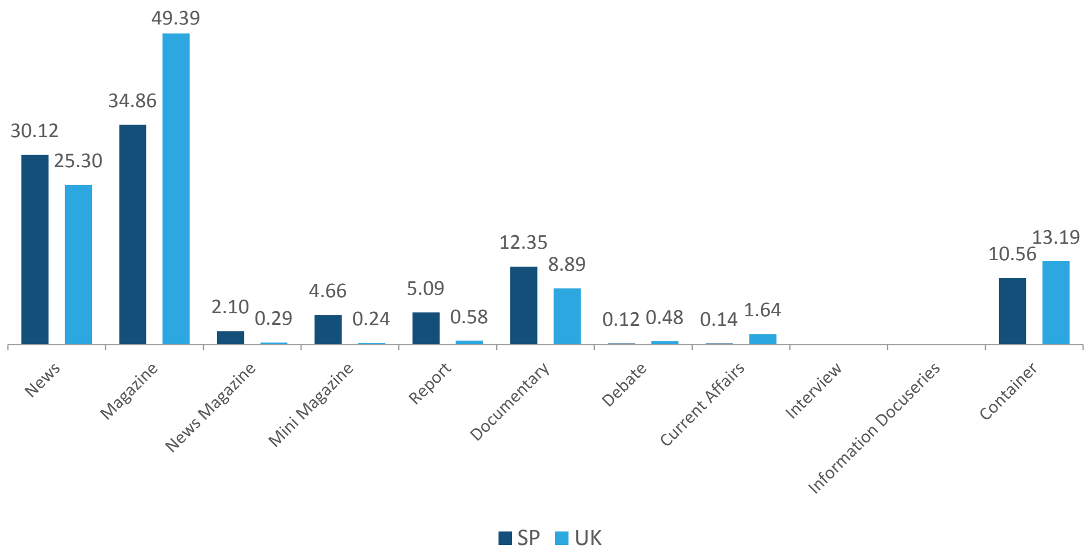
The last Serialised Fiction genre is Animation Series, which is the most similar in both countries due to the broadcasting of the same show: *The Simpsons* (FOX, US, 1989-present). In Spain the Series is aired on Antena 3 and in the UK on Channel 4, which acquired the rights to broadcast the show in 2002 after winning them from the BBC, the channel that had held them for the previous six years (BBC News, 2002).

Originally from the US, *The Simpsons* has aired 27 seasons with an average of 22 episodes each and has already been renewed for three more. This show fills 3.41% of all the Fiction broadcast in Spain and 2.44% in the UK. *The Simpsons* targets young people especially: “At that time it is a young, adolescent and even older audience. It can reach up to 30-35. Then in older adults no, in the elderly *The Simpsons* not ...” (J. Iriarte, Atresmedia, April 16, 2016).

The scheduling strategy between both countries has some differences, but also similarities, hence the show is broadcast from Monday to Sunday in both cases. However, two episodes per day are aired on the Midday slot in Spain while in the UK only one episode is scheduled per day in the Afternoon, just before the local Serial *Hollyoaks* (1995-present). This high proportion of episodes scheduled on each channel makes it necessary to rerun the episodes frequently, which is not seen as an inconvenient for the corporations. “*The Simpsons* is also a product with high loyalty and people do not mind seeing it 20-30 times” (J. Iriarte, Atresmedia, April 16, 2016).

8.2.3.2. Imported Information

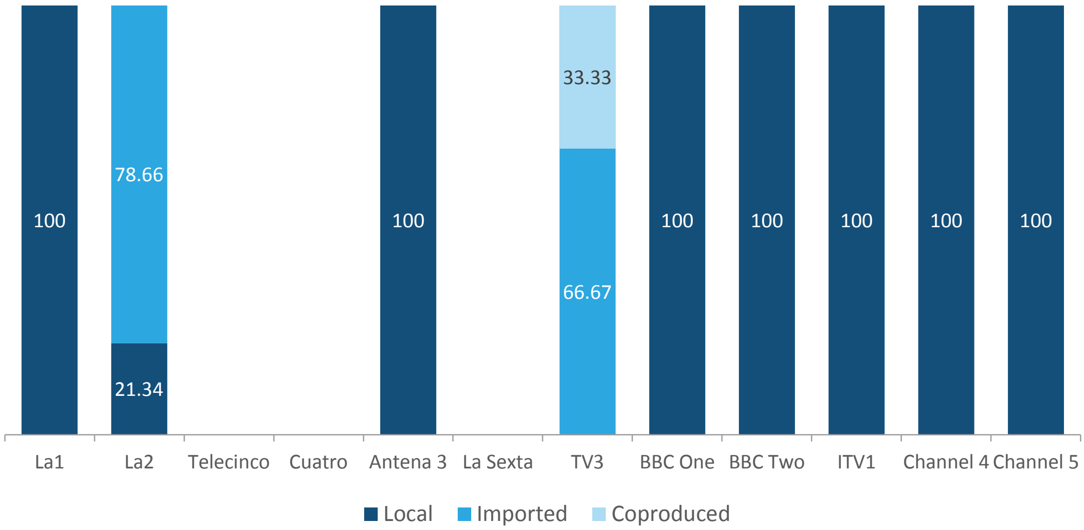
Chart 21 - Information genres separated by country. Season 2014-2015



Information is one of the three main macrogenres in the European schedules with Spain in first position (47.77%) followed by the UK (26.11%). Due to the intrinsic characteristics of the contents of this macrogenre, Information is mostly allocated to local productions in both countries at 90.47% and 98.84%, respectively. In Spain, the remaining 9.26% of

Information is imported leaving a tiny 0.32% for co-productions while in the UK the 1.16% belongs to co-produced Reports. The only genre imported, and only by Spanish channels, is Documentary.

Chart 22 - Documentaries by types of production separated by channel. Season 2014-2015



The Documentary genre has a strong connection with public channels in both countries despite being much more accentuated in the Spanish case where 99.37% were aired by the public broadcasters. In the UK, 66.30% of the Documentaries genre is aired on public channels while the shows aired on the commercial channels reach 33.70%. Furthermore, as has been seen in the section with the organisational charts, all three public corporations (RTVE, TV3 and the BBC) have executives, or even a department in the British case, exclusively dedicated to the selection of Documentaries.

This is explained by the large quantity of Documentaries on these channels, especially the secondary channels of RTVE and the BBC. This genre is 36.97% of the schedule on La2 and 11.55% on BBC Two whereas this level is much lower on the main channels (La1, 1.19%; BBC One, 0.13%; TV3, 3.18%). Channel 4 is the only commercial channel that also has an exclusive department for the commissioning of local Documentaries as well as acquiring imported titles. This may be explained by the higher requirements of the public remit of the channel. Documentaries are 2.14% of the time in the entire schedule of Channel 4.

On the Spanish channels, 74.96% of the Documentaries are imported, 22.47% belong to local productions and 2.57% to co-productions. While all programmes aired on La1 and Antena 3 are entirely locally produced, imported programmes on La2 and TV3 are assigned the majority of the time of the genre (La2, 78.66%; TV3, 66.67%).

Due to the importance of Documentary on the channel, it is worthwhile analysing the use of this genre by La2. The RTVE executive comments that it is a key aim of the Spanish public corporation to broadcast this type of product because they serve a social remit. They actively choose to showcase this genre because it cannot be watched on any other general-interest channel, only thematic ones, the majority of which are pay-TV channels. Thus, they give viewers access to minority content. These Documentaries address a wide range of topics with Animals (23.10%), Culture (20.1%) and Science (19.7%) being most typical.

When reviewing the scheduling logics behind Documentaries, the prevalence of this genre in Prime Time (SP, 7.86%; UK, 7.90%) in both countries is noticeable, positioning it as a showcase genre. Furthermore, Documentaries in Prime Time are not just scheduled on public channels but also by Antena 3, Channel 4 and Channel 5. Additionally, the genre is scheduled across all time slots in both countries (Table 40).

Table 40 - Proportion of Documentaries in each slot separated by country. Season 2014-2015

	Morning	**Midday**	**Afternoon**	**Evening**	**Prime Time**	**Night**
SP	3.92	6.01	9.17	7.55	7.86	4.34
UK	2.42	1.65	3.34	1.96	7.90	4.01

In Spain, the spread distribution of Documentaries across the day is due on the whole to the scheduling technique used by the secondary public channel La2, where there is no difference between the scheduling of local and imported productions. As confirmed by the executive, Documentaries are attempted to be amortised by the channel by scheduling the same titles in different time slots using a queue repeat for each run. Due to the niche appeal of this content, similar ratings are achieved by the official run and queue repeat in the same week (MÁ. Morales, RTVE, January 22, 2016). To give an example, *The Great Rift: Water* (UK, BBC Two, 2010) was broadcast firstly on Monday across the Afternoon and Evening slot and a queue repeat was aired the following day in the Morning slot. This technique is typically used on the basic thematic pay-TV channels so subscribers can watch the content offered despite their daily routines.

Table 41 reflects the high diversity of sources present in the imported Documentaries of La2. European productions are scheduled in 61.38% of the time. The UK contributes most to European works with 44.36% of all imported Documentaries, confirming via the reverse direction of the flow the excellent condition that this genre has in the British market. It is also important to stress the 12.18% in the category ‘Others’. While this percentage is not representative of the whole season, this result shows the trend of acquiring Documentaries from unusual television markets by La2 breaking the general trend of purchasing from the three main territories: the US, EU and other English-speaking countries.

As far as TV3 is concerned, all imported Documentaries are originals from European markets. Again, the level of UK content is significant at 40% despite being slightly surpassed by French programmes, which have 42.50% of the time dedicated to imported Documentaries.

Table 41 - Origin of imported Documentaries on La2 and TV3. Season 2014-2015[36]

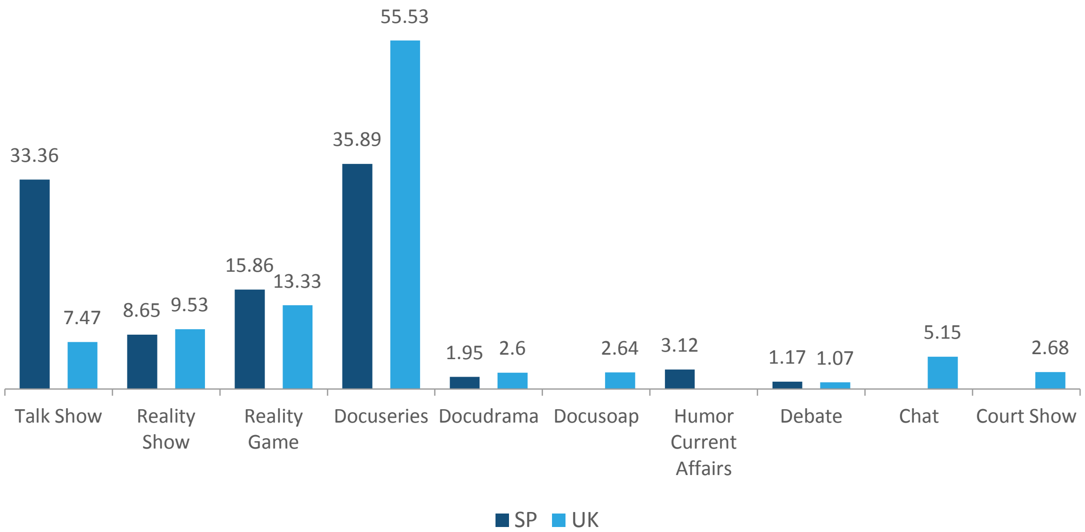
	EU		US	US + Europe	US + Others	US +OESC[37]	EU + Others		OESC	Others	
La2	**61.38**		**19.31**				**7.13**			**12.18**	
	UK	44.36					FR+CA+JP	7.13		JP	5.06
	AT	7.36								KR	5.06
	FR	5.06								TR+EG+IN	2.06
	DE+UK	2.30									
	FR+DE	2.30									
TV3	100										
	FR	42.50									
	UK	40									
	DE	17.50									

[36] List of country abbreviations – p. 14.
[37] Other English-Speaking Countries.

8.2.3.3. Imported Infoshow

The macrogenre Infoshow has gained prominence since the beginning of the 2000s due to the hybridisation of genres (Delgado & Prado, 2012; Prado & Delgado, 2010). The best known genres in this category are the realities, both Reality Games and Reality Shows, often with major successes of localised versions of international formats. For example, whereas Reality Games are only 15.86% in Spain and a similar 13.33% in the UK, the titles aired in Prime Time during the sample week are huge successes such as *The Voice UK* (BBC One, 2012-present) and *MasterChef* (BBC One, 1990-2001; 2005-present) in the UK and *La Voz* [*The Voice*] (Telecinco, 2012-present) and *Gran Hermano* [*Big Brother*] (Telecinco, 2000-present) in Spain. However, in quantitative terms, the genre Docuseries is larger in both countries, especially in the UK with more than half of the time of Infoshows dedicated to this genre (SP, 35.89%; UK, 55.53%).

Chart 23 - Infoshow genres separated by country. Season 2014-2015

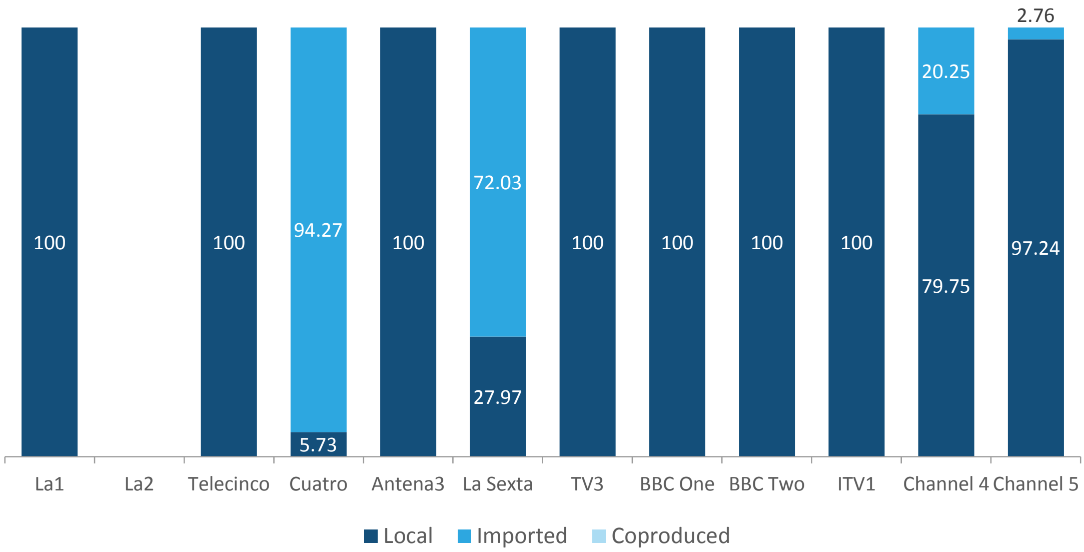


Imported Infoshows are allocated 22.82% of the time dedicated to this macrogenre in Spain while in the UK their presence is much more secondary with a lowly 3.00%. The genres partly imported are Reality Games in the UK and Docuseries in both markets.

Regarding Reality Games, *The Celebrity Apprentice* (NBC, US, 2008-present) is aired on BBC Two. This show is a declination from *The Apprentice* (NBC, US) launched in 2005 and has generated international format adaptations. The local format adaptation was firstly aired in the UK on BBC Two starting in 2005 and since the third season is being scheduled on the main channel of the public corporation. Thus, while there is an acquired Reality

Game in the UK, a genre with a close link to the territory, it is actually carefully chosen since the local adaptation is being scheduled on the same channel. Moreover, while local Reality Games are scheduled in the Afternoon, Evening and Prime Time slots in the British market, the imported programme is scheduled in the Night slot.

Chart 24 - Docuseries by types of production separated by channel. Season 2014-2015



The growth of Factual Entertainment, a category used in the industry that groups together the Euromonitor genres of Docuseries, Docusoaps and Docucomedies, is displayed in the schedules by the increase in time dedicated to both local and imported Docuseries. However, according to Atresmedia and Mediaset, if an imported Docuseries is scheduled on a generalist channel, this may reduce the standing of the channel to that of a portfolio channel. Therefore, it is not surprising that the channels with acquired Docuseries in the sample are those with the lowest share: Cuatro, La Sexta, Channel 4 and Channel 5.

In the UK, one interesting characteristic of imported Docuseries, and *Factuals* in general, is that even though content is acquired in English, there is a voice over with a British accent to give audiences a local aspect. According to Channel 5, this technique assures better ratings. A more defining strategy is to broadcast a local adaptation of an international format, especially in competitive slots. For example, La Sexta has broadcast *Pesadilla en la cocina* (2012-present), which is the Spanish adaptation of the British format *Ramsay's Kitchen Nightmares* (Channel 4, 2004-2007).

Comparing the scheduling strategies of local and imported Docuseries in Spain, all imports are scheduled in the Morning slot while local Docuseries are also scheduled in the Night slot, as a more competitive strategy. A similar strategy is followed in the UK where locals are aired across the day while imported Docuseries are aired in the Morning and Night slots. The latter is not as competitive in the UK as in Spain.

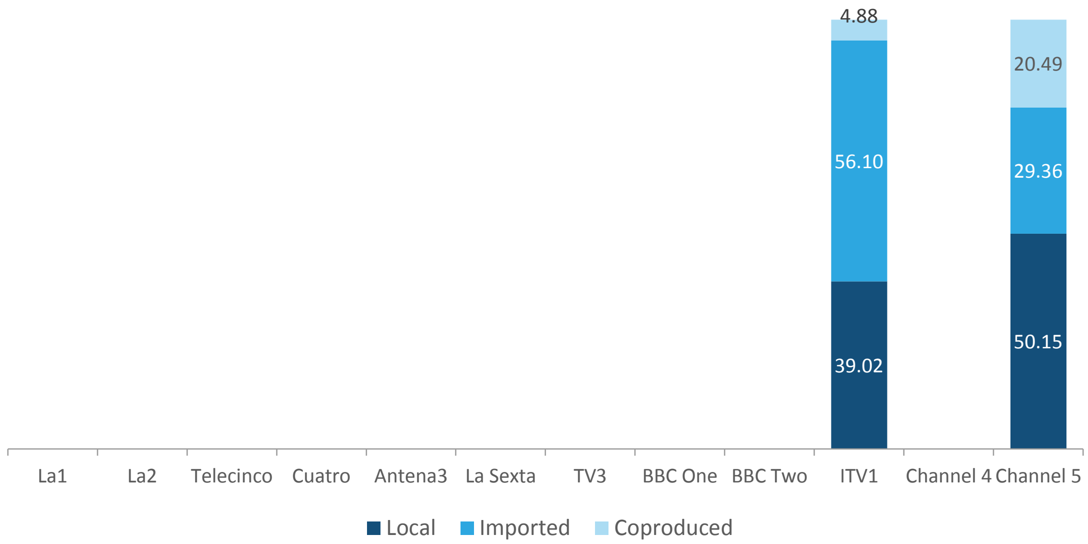
The imported Docuseries belong to four different microgenres and are tightly defined on each channel. La Sexta and Channel 5 air Crime Watch shows acquired mainly from Canada. As with all imported Docuseries La Sexta airs the Crime Watch shows *Crime Stories* (CA & US, Court TV, 1998-2008; truTV, CA & US, 2008-2010) and *Forensic Files* (CA, TLC, 1996-2000; Court TV, 2000-2007; truTV, 2008-2011) in the Morning slot. Channel 5 schedules *True crimes: the first 72 hours* (CA, 2003-present) in the Night slot of two different days, Fridays and Saturdays.

The other Spanish channel with imported Docuseries, Cuatro, schedules Animals shows (68.51%) and domestic/gardening programmes (31.49%). Referring to the first category, the Mediaset executive remarked that they needed content for the Morning slot and as a compromise *Dog Whisperer* (National Geographic, US, 2004-2012) was screened and subsequently purchased. Initially, the show made an impact because it was a very new style, however, there are now many similar shows with a variety of topics in the Spanish market, especially on the DTT channels. Cuatro also broadcasts *Bondi Vet* (Network Ten, 2009-present) from Australia.

Channel 4 acquires the Business Docuseries *Undercover Boss Canada* (W Network, 2012-2013). This import has to be placed into context since the channel is broadcasting an adaptation of its original format. *Undercover Boss* (2009-present), which at the same time was inspired by the BBC Two programme *Back to the floor* that was launched in October 1997, was originally broadcast on Channel 4. After this initial airing, localised formats have appeared around the world including Canada. Additionally, the British channel also airs the US version of the format not reflected in the sample week.

8.2.3.4. Imported Children's content

Chart 25 - Children's content by types of production separated by channel. Season 2014-2015



Due to the proliferation of portfolio channels, most traditional broadcasters have a thematic channel exclusively for children. RTVE has Clan; Mediaset has Boing; TV3 has El Club Super 3, although this shares the same frequency as 33, a cultural channel; BBC has CBeeBies; and ITV has Citv. The only channels that do not have a portfolio channel aimed at this target are Channel 4 and Channel 5 in the UK and Atresmedia in Spain, although the latter has a permanent slot on its Neox channel called *Neox Kids*. In addition, there are also other pay-TV thematic channels aiming at this target in both markets.

Thus, the high availability of programmes has led to reduce amounts of this macrogenre on the general-interest channels. However, this category is still notable in the UK since it fills 5.16% of the time of the sample. Channel 5 is the channel which airs the highest percentage of Children's content with 20.49% of its schedule while ITV1 also airs this macrogenre 5.14% of its time. Both channels broadcast most of their Children's programmes as a container. In the case of Channel 5 it is called *Milkshake!* (2006-present) and on ITV1 *Scrambled* (2014-present).

ITV1 has a higher proportion of imported shows representing more than half of their Children macrogenre with 56.10% due to having less time allocated. In contrast, Channel 5 fills the majority of the time with local productions (50.15%). Nevertheless, this does not mean that all these products have been commissioned by the channel. Instead, as previously commented, Channel 5 is broadcasting an amount of local Children's programmes that have been originally released on another channel in the same country. This is the case of *Ben and Holly's Little Kingdom* for example, firstly aired on Nickelodeon.

Children's contents of all types, local, imported and coproduced, are concentrated in the Morning slot of both ITV1 and Channel 5. However, ITV1 only broadcasts Children's programmes during the weekend while Channel 5 schedules this type of content every day of the week. Cartoons is the most prominent category on both channels (ITV1, 70.73%; Channel 5, 91.74%) (Table 42).

Table 42 - Children genres on ITV1 and Channel 5

	Cartoons	Modelling Animation	Container	Show	Puppet Show	Mixed Animation
ITV1	70.73		2.44		7.32	19.51
Channel 5	91.74	3.06	1.53	1.53	0.31	1.83

On ITV1, imported Children's content is 65.22% of the macrogenre and it is acquired from the US market. In addition, other English-speaking countries, particularly Canada, have great importance with their solo productions at 13.04% and also co-productions with the US at 21.74%. Channel 5 has a higher variety of sources despite the number of programmes from the US and other English-speaking countries also being high at 28.13% and 38.54%, respectively. In addition, a significant 12.50% corresponds to an Icelandic show.

8.3. International television fairs

Television fairs such as MIPCOM or MIPTV and events such as the LA Screenings play an important business and cultural role in the international television flows (Havens, 2003) and can influence all the different factors of the selection stage.

These events are an opportunity for distributors and Acquisitions Executives to meet in one place and the former to present products to the latter. However, the importance of these events has been questioned in the industry since local television channels currently receive products constantly without the necessity of attending a television market. "Nowadays you receive offers through the Internet from any part of the world and you do not have to move if you don't really want to" (MÁ. Morales, RTVE, January 22, 2016).

Furthermore, even if broadcasters do not receive offers, they are still informed of what is being produced worldwide. According to Acquisitions Executives at the main general-interest channels of the UK and Spain, the main function of discovering new programmes at television markets has lost its importance. However, "it is a chance for them [distributors] to big it up and sell it to you in a noisy, fun manner" (S. Breslau, ITV, September 16, 2015).

Notwithstanding, television fairs are still considered to be important for networking and meeting distributors face to face. "Everyone says they are kind of shrinking but I think in terms of getting face to face contact, and meeting people and making sure you know what's out there and getting the view of what's out there I think that is still important" (MC. Dunlop, Channel 5 Corporation, July 6, 2015). Furthermore, corporations also consider that since their competitors are attending then they continue to be important events. Furthermore, all the television corporations included in the sample attend the MIPCOM and MIPTV as buyers but also as sellers of their products.

The LA Screenings, a yearly event in May where the US majors present their pilots Series for the next season, is an exception among the television fairs. Firstly, there are only US products from the main studios despite being less than a week before US independent producers also organise Screenings for international buyers. Secondly, while the products presented at the other television markets have usually aired in their original market or are being broadcast, the products presented at the LA Screenings are pilots that have not been aired as a Series. Thus, the products presented are new to all executives. Thirdly, as the US is the most desired market, there is high competition among executives from the same countries. And while the same pilots are also screened one week later in other regions of the world such as London, corporations attend the event in Los Angeles in order not to be at a disadvantage to other companies.

Another important asset of the LA Screenings is that they are held in May, the part of the year when channels are creating their schedules for the following season (K. Ames, Channel 4 Corporation, November 25, 2015). Therefore, local executives attend the screenings aware of their budget and channel requirements. Nevertheless, currently most decisions of what to acquire are taken two weeks after the event when the executives have returned to their country (K. Ames, Channel 4 Corporation, November 25, 2015; S. Breslau, ITV, September 16, 2015).

While LA Screenings is praised because it presents new products from the main players of the international television flows, the strongest asset of MIPTV is that it leaves space for smaller distributors, also in contrast to MIPCOM. Consequently, it is an opportunity for the Acquisitions Executives to meet with the distributors that do not have the economic strength to send representatives internationally (MÁ. Morales, RTVE, January 22, 2016; MC. Dunlop, Channel 5 Corporation, July 6, 2015).

The executives from RTVE and Atresmedia also highlighted the importance of Film Festivals and Film markets for their departments, such as the American Film Market, the Berlinae and the Toronto International Film Festival. Not surprisingly, La1 and Antena 3 are the channels where Feature Films have the highest percentage of their schedules in the entire sample with 15.34% and 12.91%, respectively. In addition, they also fill 5.49% of the time on La2 and 7.34% on La Sexta. The main objective of RTVE executives when going to Film festivals is to watch the new Feature Films selected for the contests and consider their level of interest in the titles. In contrast, Atresmedia only attends those festivals that have a parallel market where the rights for the Films can be purchased from the producers or distributors. For example, the Feature Film *John Wick* (US, 2014) was acquired directly from the independent producer at a Film festival with no other intermediary.

In this chapter, the main factors influencing local broadcasters and Acquisitions Executives in the selection of canned television programmes from the international marketplace have been displayed. Firstly, the two internal factors, those related solely to each corporation, are the channel's brand and the scheduling. Both factors are highly interconnected and directly condition the content that is suitable for each channel. While these factors are not new, with digitalisation and the economic crisis corporations attempt to confirm where a programme is going to be scheduled before its purchase. In addition, in most cases the specific slot is also known.

Secondly, the glocal factors combining the shared standards of the transnational market and the interests of local corporations and viewers have been displayed. These are the volume, the definition of quality, the impressions on the different sources where content can be acquired from and the notion of macrogenres and genres. Generally, all corporations have similar perceptions regarding the four glocal factors creating a standardisation of the selection process resulting in a homogenisation of the content purchased. The certain degree of dissimilarities is only found to differentiate each channel from the competitors but all corporations have a conservative approach.

Lastly, the international television fairs have lost part of their purpose in the digital context. However, they are still considered important and can influence the selection of programmes imported. The main reasons given for attending these fairs are meeting face to face with distributors in order to not be at a disadvantage to competitors.

9. NEGOTIATIONS WITH INTERNATIONAL DISTRIBUTORS

As in the acquisition process in general, the negotiations to acquire audiovisual content vary greatly from one case to the other due to the constant changes in the needs of the channels. Additionally, the relative strength of each side of the negotiation depends on how many competitors are interested in that content. For example, if there are many players interested in acquiring a Feature Film, the distributor will have most of the power to decide whereas if only one player is interested the broadcaster or VoD platform will be able to negotiate the conditions on its terms. Furthermore, the characteristics of the macrogenres or the genres to be acquired have a direct influence on the key aspects of the negotiations.

In this chapter, firstly the types relationships between local and international distributors will be portrayed examining the types of agreements made and explaining the strategies of local broadcasters to secure content for a low license fee. Secondly, the negotiation terms, which include the terms of the television window purchased and the price will be discussed focusing on the practices of the local Acquisitions Executives in Spain and the UK.

9.1. Package deals

As was mentioned in the organisational chart section, there is a major difference between the UK and Spain when negotiating with distributors. In the UK, the same executives who are in charge of finding and selecting the content are the ones negotiating agreements with distributors. However, in Spain other Business Affairs Executives are responsible for the negotiations. Despite this distinction, all corporations deal with two types of distributors that directly affect the negotiations: the US majors and independent distributors, which have different strengths in the transnational television value chain (Miñarro, 2013).

Channels can buy international content in two different ways reflecting their specific needs. While in a number of cases there may be interest in a specific stand-alone programme, for example a documentary acquired individually, in other cases a high volume of content is needed. This is usually the case for the two easiest genres to schedule, Feature Films and TV Movies.

Broadcasters prefer to acquire products in packages in order to pay a lower price for each programme acquired. “Obviously, if you can get a package together it’s better in terms of the levels of license fee” (MC. Dunlop, Channel 5 Corporation, July 6, 2015). However, a distinction has to be made between the general concept of package deals and a specific type of package referred to as an *output deal*. While package deals refer to procuring more than one programme or title in the same negotiation, output deals are often used to talk about agreements where the distributor, a US major, imposes its strength onto a local broadcaster to compel them to purchase certain programmes that are not necessarily required.

Nonetheless, output deals are seen significantly different in the UK and Spain. In the British market, output deals are considered detrimental to the broadcaster because it is an obligation to take all the content that a major produces. Consequently, corporations of the sample agree that these types of agreements are no longer made in free-to-air British market. “We don’t do output deals anymore, we do have package deals” (S. Breslau, ITV, September 16, 2015).

In contrast, in Spain output deals are viewed as a considerably less rigid agreement between a US major and a local corporation favouring both parts albeit admitting that “when you buy Feature Films through packages you don’t say, I want this one, this one and this one. No, you have them all” (J. Iriarte, Atresmedia, April 16, 2016). With this point of view, it is not surprising that output deals are still present in the Spanish market for Non-Serialised Fiction.

Although, the negotiation power of Spanish broadcasters has increased from before the economic crisis, which allows them to acquire deals more similar to their initial interests. “The famous output deals are a thing of the past more than the present. The wild output deals that were made many, many years ago, especially with public television. It was a blank cheque” (Á. López, Mediaset, June 9, 2015). While in the past channels had to acquire everything the US majors wanted to sell to be able to broadcast their blockbusters, Spanish channels currently negotiate in a more defined manner with the US majors who can no longer force the sale of all their products to a specific channel if not wanted.

Output deals are typically multi-annual agreements with a standard duration of three years. Due to the high volume of content and complexity, the negotiations of output deals are much longer than when acquiring a specific programme or a small package and they usually last for approximately six months. Firstly, the majors make an offer to the broadcasting company on what it is expected and what they want to sell. Secondly, the channel counteroffers until they reach an agreement that satisfies both sides. “At the end you always find an agreement” (J. Iriarte, Atresmedia, April 16, 2016).

This ensures that corporations posses the rights for a specific number of new Feature Films each year, normally between ten and twenty titles as stated in the interviews. While the company knows exactly the Films being acquired in the first year and for the majority of the second year, the titles the US major will produce for the third year are unknown. However, this is not considered to be a risk since while not knowing the specific Feature Films, certain types of titles are expected from each major. In addition, the final price depends on the success of the theatrical release in the Spanish market.

In addition to the new titles, taking a package of library content is frequently suggested, which channels consider useful. Library Films and TV Movies are more economical so if added to the package, the average cost of titles within the output deal is reduced. Additionally, Spanish corporations are not currently obliged to acquire Non-Serialised Fiction as happened when there was a clear ‘producer-driven’ chain. Furthermore, before digitalisation it was common to agree to acquire the rights for an entire series, even those seasons that had not yet been produced. This practice is no longer use and broadcasters buy one or two seasons at a time in both markets.

To conclude this section, Spanish channels currently negotiate in a more defined manner with the US majors who can no longer force the sale of all their products to a specific channel. Nevertheless, their negotiation strength is far from that of the British broadcasters in the international market. In the UK, free-to-air corporations only close package deals where the products acquired are more actively selected, even Feature Films, showcasing their strength in the transnational television value chain.

9.1.1. Shared deals

An additional method of securing more economical license fees besides package deals is by purchasing a package with another content aggregator. In this cases, the distributor receives a higher level of income for its intellectual property while the costs of the content are spread between each broadcaster or service.

Corporations can share packages in two different ways depending on the type of channels and the exclusivity of the rights held on the products. The first is to divide the titles equally. In this case, each company retains the rights for their half of the package in exclusivity for the entire length of the license. The other system of sharing a package is to intersperse the runs of the programmes. Each company has the first run of half the titles until all the runs bought are used. In both cases, to ensure that both companies have similar conditions the titles are divided equally by one company allocating similar programmes in the two collections while the other company chooses one of the collections.

In Spain, free-to-air corporations share package deals with other free-to-air companies. For example, RTVE and FORTA, the federation of regional public channels in Spain, have several shared output deals. They consider themselves as natural allies since both of the corporations are public services. As commented by the RTVE executive, in 2016 they had an active output deal with the US major Warner. Furthermore, the partnership between RTVE and FORTA has also led them to work together with other companies such as Atresmedia who, in this case, holds 50% of the rights and RTVE and FORTA equally divide the remaining half.

RTVE also works with other partners alone and has shared deals with Atresmedia. In 2016 they had two actives packages with eOne and Sony (MÁ. Morales, RTVE, January 22, 2016). While these companies are in competition for the same audience, they consider sharing deals beneficial for both parts. However, the corporation with the most market share, Mediaset, does not share any of its agreements with international distributors (MÁ. Morales, RTVE, January 22, 2016; J. Iriarte, Atresmedia, April 16, 2016).

In the British market, none of the free-to-air corporations have acknowledged any shared deal with their direct competitors and it seems unlikely due to the high level of competition in the market. However, Channel 5, the channel with the smallest budget, stated that "we have good relationships with UKTV and NCB Universal so we do window with them quite a lot" (MC. Dunlop, Channel 5 Corporation, July 6, 2015). Another example commented on by the channel was the case of the Series *Gotham* (FOX, US, 2014-present). Channel 5 was able to secure the hottest show at the LA Screenings of 2014 due to partnering with Netflix so the income received by the distributor was higher.

9.1.2. The handicap suffered by regional channels

Regional channels are at a significant disadvantage when acquiring imported content because they only reach part of the territory of a country. Therefore, these channels usually pay less for the content acquired because the programme is less eroded by their window. However, it typically results in the inability of the distributor to sell that window to the entire country. Consequently, distributors are more interested in supplying their products to the channels with the highest footprint.

In Spain, as has been previously mentioned, public regional channels created a federation called FORTA to work as a unit in different circumstances such as acquiring international content. When buying imported programmes, each regional channel of FORTA acquires the rights for its territory and pays a proportional part of the total price in relation to the population in its autonomous community. Spain being the 100% of the price, CCMA representing Catalonia pays 18%, Andalusia 20%, the Basque Country 5% and so on with all the other regional channels (C. Blanch, CCMA, May 18, 2015).

However, they do not cover the entire territory. First of all, a small number of autonomous communities have never launched a public regional channel. The law regulating the *Third Television Channel*[38] created in 1983 established the option of creating the channels but there was no obligation. Second of all, some of the channels have closed as a consequence of the economic crisis or political intervention such as the channel of Valencia in 2013[39].

The economic crisis has also affected the practices of FORTA and working as a unit has become more difficult because of the imbalances inside the federation. Thus, in recent years the trend of closing agreements with only some of the channels has increased. Partly, this is also because each channel has its own scheduling strategy and their needs are different. Some may be interested in a genre while some others are not.

For these reasons, the Spanish regional channels do not achieve a similar economic strength, even when using combined purchasing power, to the channels that they are in competition with which have a larger footprint. Nevertheless, the public regional channels have been able to place strong titles in their schedules "because there is a work of seduction, of negotiation, an exchange of assets" (C. Blanch, CCMA, May 18, 2015). In order to convince distributors to supply products, regional channels design strategies to raise interest. The most common way is to create windows with channels that have a larger footprint (C. Blanch, CCMA, May 18, 2015) and in this way, the investment is lowered while the distributor has a more valuable agreement, as has already commented.

[38] *Ley 46/1883 reguladora del Tercer Canal de Televisión.*

[39] The public regional channel of the Valencia autonomous community may be re-launched again as a consequence of the change in the regional government. A new director was appointed February 23, 2017 (Almenar, 2017).

This alliance does not prevent each Spanish regional channel from also acquiring products individually. A variety of programmes, if they are not in demand, are easy to access and are affordable such as Documentaries or some European Fictions. In contrast, the unity is needed more when acquiring highly requested content like the Feature Films of the US majors.

9.2. Negotiation terms

Moving on to the negotiation terms, while both channels and distributors expect different results for each programme resulting in every negotiation being different, the key elements agreed on are always the same and relate to the characteristics of the license acquired. However, with the digitalisation of audiovisual content and the increased speed of television flows new terms have been introduced and others have changed their characteristics to satisfy the needs of the new context.

In this section, the most important terms broadcasters and distributors negotiate in order to transfer rights will be analysed. These include all the considerations of the television window purchased, which are the length of the license period, with exclusivity or holdback, the position of the window in the windowing process, the number of runs and the type of rights acquired by the channel. Lastly, considerations about the price of the programme or package will be presented, which are conditioned by the other negotiation terms, the characteristics of the local market and the level of competition for that content.

9.2.1. The television window

The television window is one of the several windows distributors transfer the rights for their content, especially Fiction. Before digitalisation, distributors had an established order of windows in order to reduce the effects of cultural discount and the erosion of products and to maximize incomes (Miñarro, 2013). However, the windowing exhibition process has changed and diversified in recent years to adapt to the increase in methods of consumption and distribution of audiovisual contents. The new situation is diversifying the number of types of possible exhibitors as well as altering the order of the windowing process.

The pressure and competitiveness for Serialised Fiction, the macrogenre which is most acquired and most desired by the free-to-air generalist channels, should be highlighted. In addition to its role in the schedules of traditional broadcasters, Fiction is also a key element for pay-TV and the new VoD platforms increasing competition further. Furthermore, the easy access to illegal copies of audiovisual content online has intensified the importance of being the first windows in the local market for the content not to be too eroded. Imported programmes were firstly aired on pay-TV channels and the window for free-to-air television followed. Nowadays all players want the first window and a long holdback to escape the effects of digitalisation and the rise in competition.

Spanish general-interest channels were not greatly concerned with the pay-TV window before digitalisation. Nowadays, the erosion programmes suffer after this window is bigger, especially because time is key to maintaining viewers interest. Pay-TV channels like AXN or FOX, with its slogan '*Primero en Fox*' ['First on FOX'], have directly influenced the free-to-air channels. In addition, Movistar, the biggest pay-TV platform in the Spanish market, has recently started to be more active in acquiring Serialised Fiction and requesting longer holdbacks, altering the usual practices.

For example, Atresmedia was interested in acquiring the Series *Ray Donovan* (Showtime, US, 2013-present) but did not because Movistar had a one year holdback. According to the executive, the erosion would be too great as had previously happened to the corporation with *Game of Thrones* (HBO, US, 2011-present). Currently, if a Series is bought by Movistar, Mediaset and Atresmedia are no longer interested (Á. López, Mediaset, June 9, 2015; J. Iriarte, Atresmedia, April 16, 2016).

Due to the deeper penetration of pay-TV platforms in the British market and their higher competitiveness, this situation has been happening for a longer time in the UK. "We would say if we can't buy something relatively quickly or we can't go first, the value is not sufficient for us to want to make a deal" (S. Breslau, ITV, September 16, 2015).

The greater levels of competition have made exclusivity and holdback become standard requests for the acquisition of imported programmes by all content aggregators in both markets. Free-to-air and pay-TV channels as well as VoD platforms desire as much exclusivity as possible while distributors want their buyers to have as little as possible. Nonetheless, this is more important for the programmes acquired for the main channel. As mentioned by Atresmedia or ITV, portfolio channels are less worried about the erosion of the content because usually the Series acquired repeat well. For example, the Atresmedia portfolio channel Neox schedules Sitcoms which are aired at the same time as on pay-TV channels in the Spanish market. Furthermore, in some cases such with as *Modern Family* (ABC, US, 2009-present) the same season is aired on both channels in the same year.

9.2.1.1. Number of runs

Regarding the number of runs purchased, it has to be mentioned that the requirements of the channels in the sample are different to those of the portfolio channels because of their distinct scheduling logics and techniques. However, in both cases channels have the complete freedom to decide when to schedule the runs purchased, all of which typically have the same conditions, for example, in terms of the catch-up rights (MÁ. Morales, RTVE, January 22, 2016).

All executives in both markets, except for Channel 4 who did not give a figure, comment that the most typical deal for their generalist channels is three runs in three years although indicating that it varies from case to case. While there is occasionally the option of acquiring more runs, this is not always convenient since programmes erode their appeal with each run. Therefore, the ideal number of runs are those able to be amortised at a lower individual price while having the ability to be scheduled with sufficient space between each.

The genre of the programme being acquired also influences on the appropriate number of runs. As previously stated, Serials do not repeat well as a consequence of the high level of continuity in their storyline whereas Series and Sitcoms perform better because of their self-contained episodes. These considerations are not restricted to Serialised Fiction alone, "when you are making the purchase you know more or less the trajectory that Film has, to name a genre, and more or less what it can bring" (MÁ. Morales, RTVE, January 22, 2016).

Furthermore, the price is also a decisive element. The cost of acquiring three runs will be less than if more are purchased. As a result of this, it has to be considered if the extra cost will be amortised across all the extra broadcasts or if the programme will have lost most of its appeal. Having too many runs can be detrimental since a percentage of the products may not be finally used. Despite the number of runs purchased, channels internally decide on the quantity of runs required to fully amortise the imported product, while the remaining are aired at zero cost.

These concerns alter when the rights for a programme are repurchased by the same company, usually acquired at a lower cost. An unwritten rule mentioned for the Spanish market is that the second acquisition should be half of the cost of the first. Additionally, since the channel knows the performance of the content, extra runs will normally be added to bring the total number to four or five (Á. López, Mediaset, June 9, 2015).

9.3.2.1. Queue repeats

Queue repeats have become standard practice in negotiations and allows the broadcaster to air a programme twice for the price of one run. Hence, a queue repeat does not count as a use of a run. However, these repetitions usually have to be scheduled close to the transmission of the official air. ITV is the only company referring to this technique as an *exhibition week* in which two runs are included.

An important consideration to be highlighted is that a queue repeat does not necessarily have to be aired on the same channel as the original run. For example, the Spanish and British commercial channels air the queue repeats for Feature Films scheduled on general-interest channels on a portfolio channel of the same corporation. With other less mass-appeal genres, the queue repeats can be encountered on the same channel. RTVE especially uses this technique to form the scheduling strategy of Documentaries, as already mentioned. With the use of the free queue repeat the same title can be scheduled twice in the same week in different slots to reach more viewers.

9.2.1.2. Rights acquired for imported content

Whereas with programmes commissioned by the channel most rights in that market are kept[40], when an imported programme is acquired the broadcaster and the distributor have to come to an agreement on the specific rights transferred to the local company. These are determined in the initial steps of the negotiations and are fundamental to reach an agreement between the distributor and the local corporation.

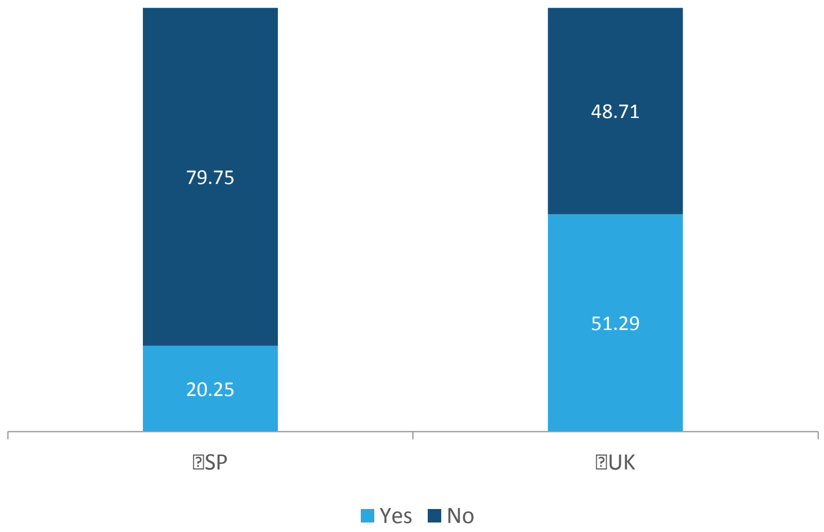
While currently in the multiplatform environment there are alternative methods of exploiting programmes, linear scheduling continues to be the most important for the general-interest channels and the others are only complementary. However, the future is uncertain in how the medium will develop. The sample executives consider that acquiring only the linear rights for imported programmes is becoming less common since media corporations want to make available their acquisitions in as many windows as possible. Consequently, aspects such as simulcast or catch-up are becoming more important. The inclusion of varying amounts of rights will directly affect the cost of the content. “So, obviously these days it’s much about your rights package, so what are you gonna be able to achieve getting it for non-linear broadcast” (S. Breslau, ITV, September 16, 2015).

[40] Despite that independent producers in the UK keep the exploitation rights, British channels can obtain all the rights during their license period (Chalaby, 2010).

The main rights that channels can acquire mentioned in the interviews are: linear broadcasting, simulcast (streaming), catch-up, and the already mentioned queue repeat. In the following section the considerations about simulcast and catch-up of imported television programmes by the local Acquisitions Executives will be presented. Additionally, the results form the content analysis of the online platforms of the corporations during the sample week, focused on the presence of the imported productions aired in the linear schedule will be presented. This will allow us to compare the information given by the executives with the actual online presence of these programmes during season 2014-2015.

9.2.3.1. The simulcast right

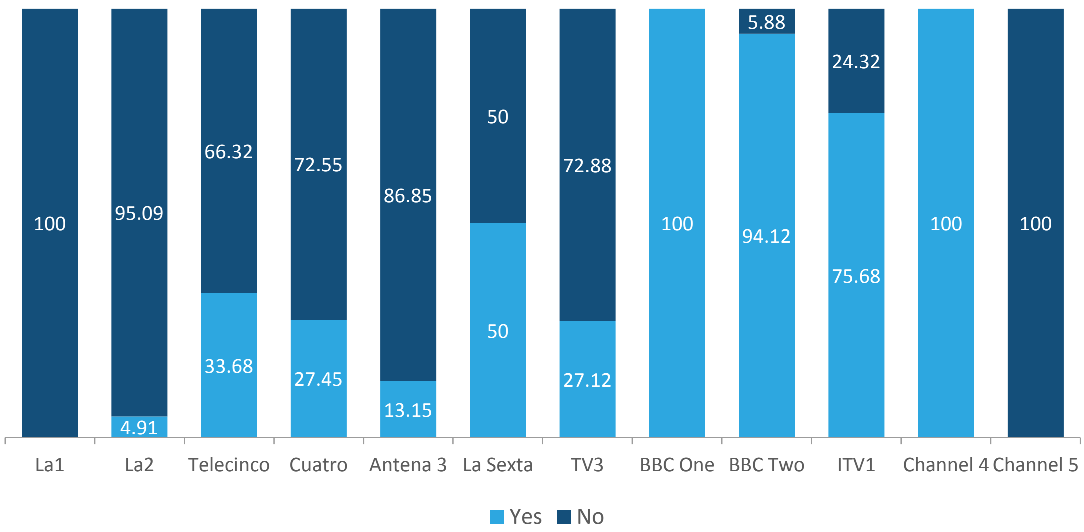
Chart 26 - Availability of imported content on simulcast separated by country. Season 2014-2015



The right to simulcast refers to the ability to broadcast content at the same time on different platforms. The online simulcast of programmes is becoming a common practice for traditional broadcasters since it is known that audiences, especially younger viewers, watch television content on different platforms, relegating television equipment to one of a wide variety of options (Prado, 2015). In this case, the focus will be on Internet streaming at the same time as linear broadcasting.

In general terms, the UK has a significantly higher percentage of simulcast of imported content as 51.29% of the acquisitions are aired with online streaming. This percentage decreases to 20.25% in Spain leaving the vast majority of foreign content (79.75%) with no option of watching by simulcast. In order to consider the results of the sample, the higher level of development of the UK online audiovisual market has to be highlighted in contrast to that of Spain (Fontaine & Schneeberger, 2015).

Chart 27 - Availability of imported content on simulcast separated by channel. Season 2014-2015



Despite the differentiation between the two countries, it is important to stress the details of each channel since there are significant differences between them. In the UK, the three channels with the highest proportion of imports available for simulcast are BBC One with 100%, BBC Two with 95.09%, and Channel 4 with 100% of the imports scheduled available for simulcast. The British public corporation was one of the first broadcasters in Europe to develop an online strategy and position this as central to its role as a public media corporation (Fontaine & Schneeberger, 2015), explaining the results obtained in the sample. However, the low level of imports on the BBC channels has to be noted. At the same time, the online development of Channel 4 is one of the main public service remit of the channel (Channel 4, 2015), as previously explained, and has also been a pioneer with its online strategy.

In the case of ITV1, while for the executive simulcast "is an automatic assumption" (S. Breslau, ITV, September 16, 2015), and there is, therefore, an automatic expectation of being able to stream all their content, the percentage of simulcast of their imports meets 75.68% in the sample. At the bottom of the scale, the Channel 5 website does not have the option to watch any of its programmes neither local, nor imported nor co-produced on simulcast.

Spanish channels have significantly lower percentages than UK broadcasters. The channel with most simulcast availability for imports is La Sexta with 50% of its imports accessible online at the same time as linear television. The second and third place are for the Mediaset channels (Telecinco, 33.68%; Cuatro, 27.45%), although the executive remarks that they do not have a clear online strategy and that they are waiting for a successful and profitable model to be established before implementation.

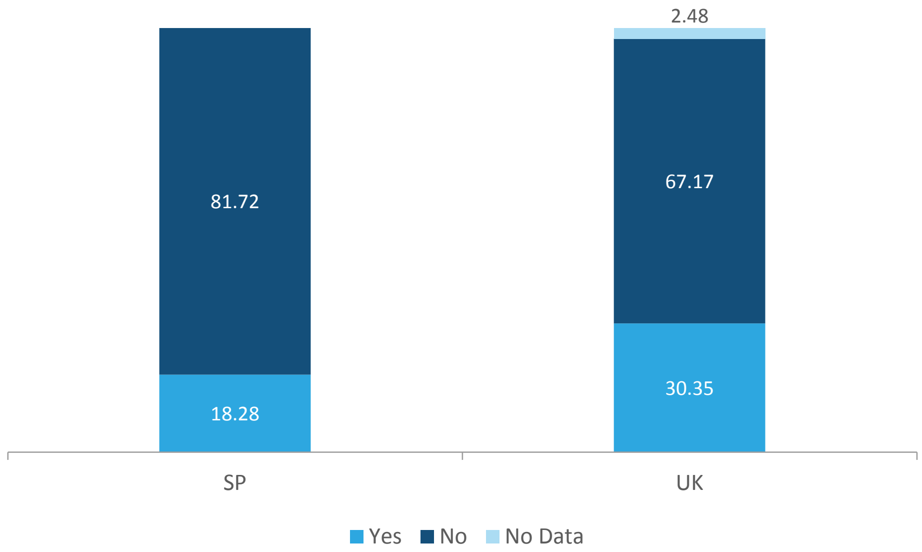
While the public channels had the advantage in the British market, the public Spanish channels are at the bottom of their market. TV3 simulcasts a modest 27.12% of its imports. Regarding the RTVE channels, none of the imports on La1 are transmitted online at the same time as the linear broadcast and a tiny 4.91% of the sample is simulcast by La2. The difficulty in acquiring these rights was commented on by the RTVE executive: "in some cases you get, not much, that you can be watching it live online at that time, but usually this is more thought about for catch-up" (MÁ. Morales, RTVE, January 22, 2016).

The Catalan corporation has a different online strategy than the other public channels when they do not possess the simulcast rights. While on RTVE and BBC notifications are shown in the screen if the rights to show the programme online are not held, on TV3 they stream the signal of the international channel to continue the programme flow.

Another aspect to consider while analysing simulcast is the differences between macrogenres. In both cases, the category with the largest proportion of imported simulcast is Infoshow at 37.32% in Spain and 85.07% in the UK. Regarding Fiction 18.89% of the imported programmes are available in Spain and 54.59% in the UK. However, imported Serialised genres (SP, 36.52%; UK, 57.09%) are simulcast more than Non-Serialised Fiction (SP, 4.39%; UK, 50.73%) in both markets.

9.2.3.2. The catch-up right

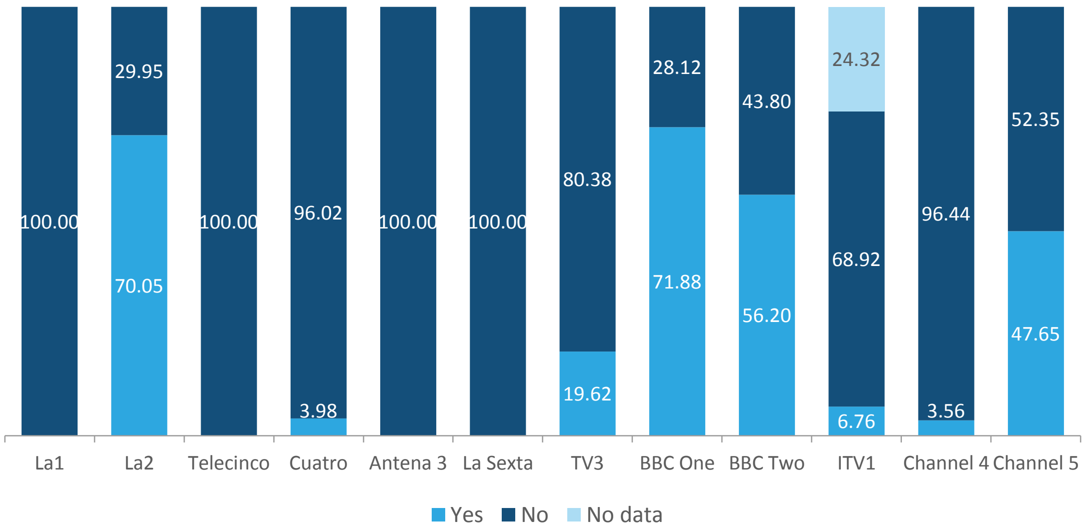
Chart 28 - Availability of imported content on catch-up separated by country. Season 2014-2015[41]



Catch-up is the other major online right that channels can obtain when acquiring content from the international market. All of the sample corporations have their own online platforms (website, phone application, smart TV application, etc.) where a number of programmes are made available via catch-up, including Channel 5. In both markets, the majority of imports are not available to watch on catch-up on the online platforms. Nevertheless, the general trend regarding simulcast rights is repeated on catch-up since Spain has a lower level of availability at 18.28% when compared to the UK at 30.35%.

[41] The percentage of 2.48% of no data from the UK corresponds to the Children Macrogenre at ITV. Since the company has a specific channel for Children's content, it was impossible to know if the catch-up was available for the episodes scheduled on the main channel.

Chart 29 - Availability of imported content on catch-up separated by channels. Season 2014-2015



The only channels in Spain with a percentage of catch-up for acquisitions are La2 with 70.05%, TV3 with 19.62% and Cuatro with a low 3.98%. Therefore, the public channels have a significantly higher quantity of catch-up rights for imports in comparison to commercial channels, the opposite situation to simulcast.

In the UK, the results of the level of imported programmes on the catch-up platforms again displays the higher level of development of the UK online market, although the availability among the channels vary considerably. The two channels with the highest percentage of imports on catch-up are BBC One (71.88%) and BBC Two (56.20%), the two public ones as happened with simulcast. The third placed channel is Channel 5 at 47.65%, closely following BBC Two. Channel 5 has no service for online simulcast but does have a clear strategy for acquiring the catch-up rights for imports. This is important since Channel 5 is the British channel which broadcasts the highest number of acquisitions.

ITV1 at 6.76% and Channel 4 at 3.56% are the two channels with the lowest amount of catch-up rights for imports, a significant distance behind the other three. Surprisingly, ITV1 stated that they would not want to acquire a programme if the catch-up rights were not available. However, none of the imported Fiction broadcast by the channel during the sample week, which are 68.92% of its imports, was available for catch-up. Regarding Channel 4, the imported Infoshow programmes and most of its acquired imported Fictions are not present. However, the rights for the new Series *Brooklyn Nine-Nine* (FOX, US, 2013-present) and *Marvel's Agent of Shield* (ABC, US, 2013), broadcast in competitive slots, are held.

The results of this section confirm the fourth hypothesis of this study since in both online rights analysed, simulcast and catch-up, the British channels on average have a higher availability of imported content than the Spanish. (H4: "The British market has a higher proportion of imported content on their online platforms than the Spanish").

It seems possible that these results are due to three different causes aside from the UK having a more developed online audiovisual market than Spain. First, the difficulty Spanish channels encounter when trying to buy the catch-up rights for their imports due to their strength in the transnational television market being weaker than the British corporations. Furthermore, a number of the Spanish executives commented the impossibility in acquiring online rights for certain contents, especially those from the US majors (MÁ. Morales, RTVE, January 22, 2016; Á. López, Mediaset, June 9, 2015). Second, as discussed above, the VoD market is more developed in the UK further motivating the channels to acquire the online rights for acquisitions to be more competitive in the audiovisual market. Third, the higher budget of British corporations allows them to spend more on their package rights.

9.2.2. Price of imported content

While not being able to analyse the price broadcasters pay for their imported content since corporations do not display this information, there are several important aspects to consider that were commented during the interviews. First of all, prices vary between local markets depending on the relative strengths of local content aggregators and the economics of each market. Thus, the prices in the UK may be higher than in Spain since it is a larger market with a greater number of viewers. Furthermore, the international economic crisis has directly affected the transnational television exchanges, which has been felt more profoundly in the Spanish market. Nevertheless, Acquisitions Executives of both countries commented that currently prices are significantly lower than before 2008.

The price of content is also determined by the negotiation terms agreed on by the channels discussed in the previous sections: the position of the television window within the windowing process, the conditions of exclusivity or holdback, the number of runs acquired and the rights included in the deal. Depending on when the window acquired is positioned in the whole exhibition window process in their local market, distributors will expect to receive more or less income. Concurrently, broadcasters will be willing to spend progressively less in relation to how much that content has been eroded in their local market.

Another important factor to consider is the number of rights acquired when agreeing on a price. At times, channels are not interested in acquiring rights other than for linear broadcasting since the increase in the price is not worthwhile. As an example, acquiring the catch-up rights for Feature Films is not profitable for Spanish channels since the price would be much higher than the income for the exploitation of those rights (MÁ. Morales, RTVE, January 22, 2016; Á. López, Mediaset, June 9, 2015; J. Iriarte, Atresmedia, April 16, 2016; C. Blanch, CCMA, May 18, 2015).

The channels footprint also directly influences the price. Those broadcasters covering the entire country pay more than regional broadcasters since they erode the value of the product to a greater degree. From the perspective of distributors, it is better to sell their titles to the former channels so higher income is received from their rights. This, as explained previously, motivates regional channels to form alliances with other regional channels and to sign shared agreements with other corporations.

Finally, it is important to highlight price differences if channels acquire content through package deals or individually. Usually package deals, mostly used when acquiring Feature Films, assist channels in reducing the average price of each title acquired. In Spain, these packages, often in form of output deals, are multi-annual meaning that the channel agrees to acquire titles from a distributor for several years, usually three. In this case, the issue of defining price is how to decide on the cost of a title that has not even been produced yet.

There are two different techniques used to decide the figure. The first is a flat price, which means that the distributor and the channel agree on a specific price not taking into account the future impact of a Feature Film in the local market. In contrast, the second option is to establish the price with a ranking. Depending on the number of customers that the film has in the movie theatres of the country, the channel will pay different prices. Thus, if a film is a success, the channel will pay more since theoretically it will have better results when being broadcast on television. In contrast, if a Film has a low number of paying customers, it will be cheaper for the channel (MÁ. Morales, RTVE, January 22, 2016; J. Iriarte, Atresmedia, April 16, 2016; C. Blanch, CCMA, May 18, 2015).

In this chapter, the results provide evidence of the greater strength of British broadcasters when compared to the Spanish in the transnational value chain. This position influences their relationship with international distributors being able to more actively select the titles included in the package deals. In contrast, output deals are still a usual practice in Spain, despite being less aggressive than before the economic crisis.

Notwithstanding this difference, the terms negotiated are the same in both cases with regard to the television window purchased. Firstly, the increase on competition has forced channels to attempt to acquire the first window in their local market and petition for exclusivity and holdbacks. Secondly, the number of runs usually purchased remains at three years. However, an additional free queue repeat for each run has become an industry standard. Thirdly, the rights to simulcast and offer the imported programmes on catch-up are becoming more essential for local broadcasters. However, the availability of these productions is still low, especially in the Spanish market.

CONCLUSIONS

10. CONCLUSIONS

This study has analysed the process that channels follow when acquiring canned imported programmes from the international television market. The results show the significant role of the Acquisition Departments and Executives in influencing which imported content is scheduled on the main general-interest channels of Spain and the UK. Their role as cultural intermediaries is at the centre of the acquisition process since they mediate between the international content available and the local viewers.

In this research a middle-range approach, as in Havens (2006), Meehan (1999) or Sinclair et al. (1996), has been used to study the processes which take place between the global television value chain, the Acquisition and the Scheduling Processes when regarding imports. In-depth interviews with local Acquisitions Executives have been combined with a quantitative content analysis of one regular scheduling week during season 2014-2015 of Spain and the UK. The sample includes the main free-to-air general-interest channels of both countries, seven Spanish (La1, La2, Telecinco, Cuatro, Antena 3, La Sexta, TV3) and five British (BBC One, BBC Two, ITV1, Channel 4 and Channel 5) including public and commercial broadcasters.

While the analysis of one week of scheduling is not sufficient to analyse certain trends within one television season such as the accurate representation of all the sources of imports present in one television season, the exploitation of the quantitative results has allowed us to contextualise, exemplify and contrast the statements and opinions of the Acquisitions Executives. Furthermore, the analysis of imported content in the schedules of the broadcasters has allowed the fulfilment of the secondary objective of comparing, at a general level, the dependency level that the Spanish and British markets have on the International television market.

The quantitative results confirm Hypotheses one and four. Hypothesis two is confirmed for the UK market and rejected for the Spanish market, however, the opposite is true for Hypothesis three.

Table 43 - Summary of the hypotheses

	Confirmation	**Section**
H1: “Commercial channels with a lower share in both markets (Cuatro, La Sexta, Channel 4 and Channel 5) have a higher proportion of imports and a higher diversity of genres with imported programmes than the market leaders”.	Confirmed	Chapter 6 – Imported content in the Spanish and British schedules
H2: “Public channels have a lower proportion of imports since they prioritise local productions”	Rejected for Spain Confirmed for the UK	Section 6.1 – Differences between public and commercial channels
H3: “Public channels acquire their imported programmes from a wider variety of sources due to their public service obligations”	Confirmed for Spain Rejected for the UK	Section 8.2.3.4 – Diversity of origins as a public service remit
H4: “The British market has a higher proportion of imported content on their online platforms than the Spanish”	Confirmed	Section 9.3.3 – Rights acquired for imported content

In addition, five research questions were formulated which have been answered across the entire results section:

Table 44 - Summary of the research questions

	Sections
RQ1: How are the acquisition departments organised in the local broadcasting corporations and how does this affect the roles played by the Acquisitions Executives?	Chapter 7 – The acquisition process of local broadcasters
RQ2: Which factors affect the decision on which international programmes to acquire?	Chapter 8 – Selection of imported content
RQ3: What relationship do local corporations have with international distributors and what terms do they negotiate?	Section 9.1 – Package deals
RQ4: Which imported programmes are present on the online platforms of the broadcasters?	Section 9.3.3 – Rights acquired for imported content

RQ5: How have the changes in the television sector prompted by digitalisation and the appearance of new players such as VoD services affected the acquisition process of traditional broadcasters?	Across the results

Main findings

With respect to the presence of imported television programmes in the schedule, while in season 2014-2015 the vast majority of the scheduling time in both countries is filled with local programmes, there are a significant number of imported productions in Spain as well as in the UK. Nevertheless, from a general point of view, Spain with 24.64% of imported content has a higher dependency on the international television market than the UK at 18.02%. However, the only difference between the two countries falls on the public channels, as was previously pointed out by the European Audiovisual Observatory at the European level (Lange, 2014). Imports occupy a secondary position in the schedules of BBC One and BBC Two (5.37% on average) while in the Spanish public channels of La1, La2 and TV3 (the Catalan regional channel), imports hold on average 23.33% of the schedule. Furthermore, La2 has a higher percentage of imports than the overall average for the country. In contrast, commercial channels have a more similar proportion of imports when comparing the two markets with Spain having 25.62% compared to the UK with 26.85%.

In addition to the quantitative presence of imported programmes, this research has shed light on the key role of Local Acquisition Departments and their Executives in the presence of these imported programmes on local channels. Furthermore, acting as cultural intermediaries, they influence and condition the transnational television flows. In general terms, the results confirm the high levels of professionalism of the local Acquisitions Executives with shared standards and values, as found in previous researches (Bielby & Harrington, 2004; Kuipers, 2012; Smith Maguire & Matthews, 2012), and their membership of a transnational professional class (Kuipers, 2011; Sassen, 2001).

This has generated a remarkable amount of standardisation in the practices executives follow in the Spanish and the British market and have produced one main consequence in the object of our study. Despite the difference between each purchase, the steps and factors taken under consideration by local executives are the same across all corporations of the sample. This produces a homogenisation of the imported content scheduled on the general-interest channels of the sample since, despite not being the same titles, all have similar types of imported products.

This standardisation has allowed the outline of a shareable process valid for all the corporations of both markets through the result. This acquisition process has been divided into two different steps: the selection of the international content and the negotiation with distributors corresponding to the two different roles Acquisitions Executives can undertake. The selection is influenced by the factors executives themselves base their decisions on. The main factors have been classified into internal and glocal according to being based on intrinsic characteristics of the corporation or on concepts shared across the professional class and adapted to the local characteristics of each market. The negotiation process is characterised by the terms discussed between the local corporations and the international distributors. While the requirements are different for each product considering the objectives that channels want to fulfil, the terms negotiated do not change and are based on the characteristics of the license acquired by the broadcaster.

To position the framework of Acquisitions Executives, the organisational charts of the Department of Acquisition of each corporation have been analysed. These are structured to answer the specific requirements regarding imported content for each corporation and, therefore, there is not a standard organisational chart. However, there are three general characteristics that are found in all cases.

First, all corporations have small teams that are in charge of the general-interest channels as well as the portfolio channels. However, the roles undertaken by the departments of the Spanish and the British markets are conducted at different levels. The high competition within the UK market and the extensive experience of the commercial channels creates more specialised professionals who are responsible for the whole acquisition process. That is to say, in all British corporations Acquisitions Executives are not only in charge of the selection process but also the negotiations with the distributors, sometimes with the assistance of a business team. In contrast, in the Spanish market, less mature in terms of commercial television, the Acquisitions Executives only select the imported content while other executives conduct the negotiations with the distributors. In the commercial corporations these business executives belong to a completely different department while in the public RTVE and CCMA they are part of the same area since there is a department exclusively for acquisitions.

Second, the relationships between the Acquisition and Scheduling Departments are considered to be essential in order to fulfil the requirements for imported content that each channel has. In some corporations the acquisition department belongs to the scheduling area (Mediaset, Atresmedia and the BBC) or some of their executives have a double role as Acquisitions Executives and also Channel Managers, as at Channel 5. In those corporations where scheduling and acquisitions are not connected, there is a risk that with no fluent communication the imported products selected are not in line with the strategies of the channels as has happened at RTVE and CCMA. Nevertheless, the economic crisis, more profoundly felt in Spain, and the increase in competition has caused corporations to more closely align the requirements of the channels with the selections made by the Acquisitions Executives.

Third, all corporations base their Acquisitions Departments on Fiction since it is the most imported macrogenre. Fiction is one of the predominant macrogenres in the European schedules in general (Delgado & Prado, 2012; Delgado et al., 2017; Fontaine & Schneeberger, 2015; Lange, 2014) and in both markets of our sample for season 2014-2015 (SP, 23.31%; UK, 24.23%). Of the time dedicated to Fiction, imports are at a high of 72.47% in Spain and 63.52% in the UK. This high volume of imported Fiction ensures that most Acquisitions Executives are focused on the selection of Fiction genres. The other category with significant resources in the Acquisitions departments is Factual Entertainment, stressing the increasing role of this genre in the schedules. In addition, the public channels and Channel 4 Corporation have executives focusing exclusively on Documentaries, who are assigned to a different department at British corporations and are in charge of acquisitions as well as commissions.

The high level of professionalism of local Acquisitions Executives is underlined by the specialisation of the executives to specific genres such as Serialised Fiction, Feature Films or Factual Entertainment. Thus, there is a director supervising across all genres while the rest of the executives are focused only on one, except at ITV and Channel 4 Corporation.

Turning now to the selection of imports, due to the generally conservative approach of television channels, the decisions on which international content to acquire are attempted to be rationalised, which enables television programmes to be treated as economic and, to a much lesser extent, cultural goods. While intuition still plays a part in the role as an Acquisitions Executive, the increase in competition and the economic driven markets forces executives to evaluate their decisions based on six main factors: channel’s brand, scheduling, volume, the notion of quality, the origin and the conceptions of each genre. One of the main contributions to this research is the outline and classification of these factors that influence the corporations when purchasing international products. The selection of cross-border programmes is influenced by internal factors within the media corporations and glocal factors, which consider shared standards across transnational executives.

The main internal factors are the channel's brand and the scheduling, which are interconnected. The brand image refers to the general image portrayed by each channel and what differentiates it from its competitors. Regarding imports, this image conditions the programmes acquired in terms of the target aimed at and the perspective the content has. As a consequence, all corporations always decide the channel the imported production is going to be scheduled on in advance in order to fit the specific brand image of that channel. It is only if that content is not performing well that the corporations decide to reallocate it to another channel, usually a portfolio channel with a lesser market share.

The schedule of each channel, the second internal factor, influence the presence and selection of imports on two different levels. The overall composition of the schedule in terms of macrogenres and genres, the first level, conditions the proportion of imports since certain macrogenres tend to be more imported than others as in the case of Fiction or Children's content. The second level is concerned with the specific slots imports are scheduled on.

Regarding the first level, in general terms those commercial channels with a lower share in the markets have a higher proportion of imports than those with a higher share. Furthermore, while the commercial channels with highest share import mainly Fiction (on ITV1 the time dedicated to Children's acquisitions only represents 2.88% of the total), Infoshow is also imported on the other channels. However, it has to be stated that the importance of certain macrogenres in the schedule of each channel is also a main conditioner for a higher presence of Imports.

In addition, the oligopoly in the Spanish market directly affects the schedules of the general-interest channels. Therefore, the presence of imports in the schedules is also influenced by this situation. For example, Antena 3 has a similar proportion of imports to its secondary generalist channel La Sexta. However, the main focus of Antena 3 is Fiction while for La Sexta it is Information.

Focusing on the dissimilarities between public and commercial channels, the difference in the proportion of imports is considerable in the UK market. In contrast, Spanish public channels have a similar proportion of time dedicated to acquired productions as commercial channels, especially La2, which surpasses the average of the country. This difference highlights the overall higher dependency of the Spanish market on international television productions.

With the second level of the scheduling factor, it is important to stress that channels have increased the decisions taken before acquiring an import to ensure the suitability for their channel and schedule. While generally channels regularly acquired content without knowing when it would be scheduled, the trend in both countries is to establish in advance into which slot the programmes is going to be aired. This trend is encountered across both markets of the sample and also among public and commercial channels (RTVE, CCMA, BBC, ITV and Channel 5 Corporation). This has been influenced by the economic crisis and the current context of digitalisation that has increased the level of competition in both markets. The only exception to this rule is when purchasing Feature Films and TV Movies. Due to the schedule flexibility of the genres, channels acquire titles in packages and later decide when to air each of them.

Glocal factors are the second type of elements encountered which influence decisions when selecting international content. These factors compose one of the main results of this dissertation since the international television trends and concepts are blended with the specific interests of the Spanish and the British markets. This contribution can help enlarge middle-range approach research of the acquisition process in other markets and other types of channels.

The main glocal factors encountered are the volume, the perception of quality, the judgment of origins and the priorities regarding genres. These factors are not implemented equally in the Spanish and British markets but the transnational ideas behind it are taken and adapted to the interests and context of the local market.

The volume needed of an imported programme is directly conditioned by three different aspects. First of all, the overall programming of each channel determines the amount of slots needed to be filled with imports. Secondly, each genre has its own characteristics regarding volume. For example, a large number of episodes is usually essential for a channel to acquire Factual Entertainment (Docuseries, Docusoaps and Docucomedies) while for Serialised Fiction it is not a crucial aspect. Thirdly, the different needs of Day Time and Prime Time television condition the scheduling strategies and the volume required for imports. While Day Time is based on repetition, Prime Time mostly creates weekly appointments.

The second glocal factor is quality since Acquisitions Executives search for foreign programmes that are appropriate for their brand while also having suitable levels of quality. Quality is not specifically defined by these executives but in their speeches the concept is linked to four different aspects: script and aesthetics, genre, price and ability to be repeated.

The origin of imported television content, the third glocal factor, may be the most studied factor by media researchers when analysing television flows. In particular, the hegemonic presence of content from specific territories, mostly the US. However, while the quantitative presence of each territory in local schedules has been thoroughly analysed over the years, the aim was to study not only the presence but also the considerations that Acquisitions Executives take when deciding from which foreign market to purchase.

With the results of this research, it can be concluded that US programmes still hold a dominant position in the Spanish and British markets. This situation is as a consequence of the natural advantages of the American television market as previously highlighted by many scholars (Doyle, 2002; Hoskins et al., 1997, 2004; Steemers, 2004) but is also conditioned by the conservative approach of the local corporations searching to secure profitability. Thus, one of the biggest advantage US products have in the Spanish and British television markets is that they are considered to be less speculative. This increases the homogenisation of the international content that audiences are exposed to on their main local channels and creates fierce competition when acquiring certain products from the US majors.

Furthermore, the presence of US productions is furthered by imported co-productions, mainly in the Feature Films genre, produced between the US market and other territories. The majority of these programmes are made with European and English-speaking countries, which gives a clear advantage to the US since it allows the introduction of their programmes into other territories as local productions. For example, a co-production between the US and an EU member is considered a European work and counts towards the fulfilment of the European works quota. Similar quotas are encountered in other countries such as Canada.

The European marketplace which produces the majority of titles with the US is the UK due to the strong connections between the two countries and the importance of the latter in the international television market. However, the departure of the country from the European Union may alter this relationship because British programmes will likely no longer count under the European works quota.

Regarding European content, the presence of productions from other European markets in Spain is important since executives are beginning to consider those productions for a wider variety of genres. In general terms, despite continuing to be allocated to slots outside of Prime Time and Night, they are acquired in larger quantities than in previous years. For example, two French Series were scheduled on La1 and Cuatro during the Night slot in the summer of 2016, the most competitive in the market for Serialised Fiction. According to the executives, European productions are being considered because European markets are learning how to produce a more international look and a dynamic rhythm in the plot to resemble US programmes.

Thus, European productions are considered by Spanish executives as long as they are produced with the intention of being sold internationally and reduce local cultural expressions to a minimum. While internal European television flows are still desirable to achieve open and comprehensive societies, European programmes can only travel into Spain if they have a more international US look, that is to say, products carrying less European local cultural traits.

Another important characteristic to be highlighted in the Spanish market regarding origin is the diversity of sources in the public channels, especially on La2. This is especially emphasised by the statements of Acquisitions Executives of public channels that origin is not a relevant factor when acquiring international programmes. Nevertheless, La1, the main channel of the Spanish public corporation, has a more commercial approach resulting in a higher dominance of US imported programmes.

In the UK, the next most common origin after the US is other English-speaking countries. In contrast, it is important to highlight that there are no productions from other Spanish-Speaking countries in Spain, as has been pointed out by the later Obitel reports (Lacalle et al., 2015, 2016). One important difference regarding imports between the Spanish and British markets is that in Spain products are dubbed into Spanish while in the UK they are subtitled in English. Thus, this gives a clear advantage to English-speaking productions in the UK since they do not have to be subtitled. Within the English-speaking countries, excluding the US, the two most common markets present in the British schedules are Canada and Australia. Nevertheless, despite their common language and these two being major territories in the international television flow, their products are still considered to be more uncertain than those from the US, especially for scheduling in Prime Time.

Despite the US hegemony, there are three trends which support the possible increase in the diversity of markets that local channels acquire content from. First, public channels are more willing to speculate on programmes coming from less commercial markets. This is a deliberate strategy by the Spanish public corporation, which considers that broadcasting content from unknown markets and more niche appeal programmes is part of their public service remit, especially European content. Second, corporations are more willing to broadcast niche programmes that come from a wider variety of territories on the portfolio channels and online services. Third, the local producers in Europe and the rest of the world are producing content suitable for sale abroad with more international aesthetics and narratives increasing the appeal of products to local Acquisitions Executives. In addition, broadcasters allow a higher degree of diversity of imported genres and sources in the less competitive slots.

The fourth and last glocal factor refers to the shared perceptions of macrogenres and genres. While channels acquire different categories, the concepts behind them are similar and shared among the Acquisitions Executives. The importance of this fourth glocal factor is that it conditions the type of programmes acquired and increases the homogenisation of the imported content present on the general-interest channels. In our sample week of season 2014-2015, the macrogenres that have imported content are Fiction, Infoshow, Information and Children.

As already identified, Fiction is the most imported macrogenre by all corporations which conditions the structure of Acquisition Departments. Specifically, the amount of imported Serialised Fiction has increased exponentially because of their role on the portfolio channels and the VoD services saturating the Spanish and the British markets. However, the decrease in efficiency has been more noticeable in the Spanish general-interest channels as noted by the executives. Nowadays, while Serialised Fiction continues to be the key genre for acquisition in the UK, in Spain it is Feature Films. Nevertheless, this does not mean that Serialised Fiction is not preferred, only that currently it is difficult for Spanish channels to amortise the titles. Buying all the episodes of at least one season is considered to be too uncertain.

Another important consideration outlined by the results regarding Serialised Fiction is the dissimilarities between Series and Serials and the differences in preferences when the programmes are local or imported. For local productions, broadcasters prefer Serials since they have continuity between episodes and deliver more audience loyalty. In contrast, imported content is preferred for Series due to their self-contained episodes so that viewers do not have to watch every episode. In addition, Series have a better ability to repeat than Serials since the order of the episodes is not essential, this being considered an aspect of quality by the executives regarding imports.

While all of the above is true, another important element needs to be added to this distinction, which is exclusivity rights. For local productions, channels usually hold the exclusivity of all the rights in its market and when an episode is aired it is the first time viewers have the possibility of watching it (Chalaby, 2016a; Miñarro, 2013). In contrast, imported content usually has different windows in each local market and viewers may have ways to watch the episode before its scheduled on a free-to-air channel.

As has been seen, traditional broadcasters are increasingly asking for the first window in their market to avoid viewers watching the content earlier elsewhere. However, this is not always possible because distributors still want to maintain the classic order of exploitation windows. In addition to this, viewers can also watch content illegally. Thus, imported Series suffer the effects of this situation less since viewers are often willing to watch the episodes several times. Another aspect is that VoD services focus their strategies on Serials.

The Infoshow macrogenre is generally imported by those channels that have a low market share such as Cuatro, La Sexta, Channel 4 and Channel 5. Additionally, Spanish corporations consider that imported Infoshow, in particular Factuals, diminishes the status of general-interest channels since it leads them to resemble portfolio channels aiming at niche audiences. This may explain why imported Docuseries are scheduled in non-competitive slots on all four channels. In order to increase the appeal of these programmes, a voice over is recorded in a British accent in the UK, which tends to give a more local feel to the product leading to better results.

The second general step in the acquisition process is the negotiation phase, which is highly conditioned by the type of distributor broadcasters are negotiating with. The relationships between the two parties are affected by the strength that the international distributor has in the transnational television value chain (Chalaby, 2016b). On the one hand, the power of the US majors and the high levels of competitiveness in acquiring their products generates a producer-driven value chain since these companies have an advantage when negotiating with local broadcasters. On the other hand, independent distributors from any part of the world have less leverage when dealing with local channels, who have more strength to negotiate on their own terms. This creates a situation where they have more power generating a buyer-driven value chain. Consequently, their programmes are acquired at a lower price and usually with better conditions for the local corporations than products belonging to a US major.

The negotiation terms are also conditioned by the size of the deal. In general terms, currently broadcasters hold three different types of deals: single programmes, package deals and output deals. The difference between package and output deals is that while in the former local channels acquire the rights for several known programmes at once within one negotiation, with output deals a multi-year relationship of usually three years is established between the broadcaster and the distributor, usually a US major. The titles acquired during the first year and part of the second are known, whereas usually the remainder are 'chosen' from the titles produced by the major in the following years.

Currently, corporations in the Spanish market have active deals of all three types, including output deals. Due to the high price of these output deals, Spanish broadcasters, except Mediaset, share rights with their free-to-air competitors in order to be able to secure the titles wanted. Nevertheless, output deals in Spain are more reasonable than the situation before the economic crisis. Before 2008, deals were often heavily weighted towards the distributor, especially for the public channels.

In contrast, only single programmes and package deals are purchased in the UK. British channels do not attach themselves to a distributor for long periods of time and do not create exclusivity agreements with US majors or any other distributor. This difference is important because it highlights the lower level of dependency that the UK market has on the international television market in contrast to Spain. Furthermore, it also highlights the greater strength that the main British free-to-air general-interest channels have in the transnational television value chain.

The type of distributor involved and the size of the arrangement directly affect the negotiations of international television programmes. However, the shared practices among Acquisitions Executives and the transnationalisation of the television market standardize the negotiation terms local broadcasters discuss with distributors. The characteristics of the television window purchased, including the position of this in the overall windowing process in the market, the exclusivity or holdback terms, the number of runs acquired, including queue repeats, and the rights involved in the negotiation are discussed. The latter is important since simulcast and catch-up are becoming more prominent when acquiring foreign programmes. Lastly, a price has to be negotiated, which is directly affected by all the terms previously mentioned.

The standards of the negotiation terms have been altered due to the new context the television market is immersed in mainly as a consequence of digitalisation, audience fragmentation and the increase in competition. The first element being restructured is the windowing process. In order for programmes not to erode significantly and to remain valuable, all of the content aggregator types, free-to-air channels, pay-TV and VoD services, require the first window in their local market and a long holdback of the exclusivity rights. This competitiveness is especially fierce when acquiring Serialised Fiction.

Before the increase in the number of channels and online platforms, free-to-air corporations were not especially concerned by the pay-TV window present in the classic windowing exhibition process. The erosion that programmes currently suffer during the pay-TV window is greater and are then not usually considered to be sufficiently valuable to acquire for the general-interest channels, especially in the British market. In most cases, Serialised Fiction that has had a pay-TV window is only considered for the portfolio channels of free-to-air corporations.

Nevertheless, while linear channels and online platforms want as much exclusivity as possible, distributors want their buyers to have the reverse in order to amortise the content in different windows generating opposing interests. This has led to a number of linear corporations to partner with other players such as Channel 5 purchasing the US Series *Gotham* by partnering with Netflix UK.

Online strategy is becoming more central to the overall strategies of traditional broadcasters since viewers, especially younger users, are consuming significantly larger amounts of content online (Bennett & Medrado, 2013; Jenner, 2016; Van den Bulck & Enli, 2014). While channels usually have the complete linear and online rights for the local content in their market, for imports these rights have to be negotiated. The main online rights for imports requested by local channels are simulcast and catch-up.

It has been noted that the level of imported programmes on the online platforms of the generalist channels in the Spanish and British markets is still low despite the importance of acquiring these rights expressed by the corporations. Nevertheless, there are three factors explaining this situation that also prevent the hypothesis that the situation will change in the short term. First, it is not in the interest of international distributors to facilitate the free-access of their products on the online platforms of traditional broadcasters due to the ease of illegal copying, which prevents the sale of the rights for these products at a later date to a VoD service at a high price at a later date. Second, the income from the incipient online advertising market does not compensate for the cost of acquiring these rights. Third, free-to-air broadcasters cannot compete online with the catalogues of VoD services filled with international content so therefore, their main aim is, and should be, to promote local productions which they have the exclusivity rights for.

There are two exceptions to these general online trends. The online rights for genres with a lower mass-appeal are uncomplicated to acquire by broadcasters since the opportunity of selling them in other windows is lower. For example, La2 is able to purchase the catch-up rights for the majority of their Documentaries and the corporation considers this online presence to be a public service. The other exception regarding imported programmes on the online platforms of traditional broadcasters is if a parallel VoD service is owned, which acquires imported programmes directly, such as Walter Presents from Channel 4. However, these services are not connected with the linear scheduling and act as an independent platform.

In general terms, the simulcast rights, the possibility of airing the content on the online platform at the same time as the linear scheduling, is more frequently found in the sample week in both countries than the catch-up rights. However, executives show more interest in the importance of acquiring the catch-up rights for their imported content. Regarding the differences between the two countries, the British market has a higher proportion of imported programmes on their online platforms than the Spanish. As concluded in reference to other aspects of the acquisition process, this shows the advanced position of the British online television market.

The reformulation of the acquisition process

The international audiovisual sector is suffering a complete reformulation which is even testing the limits of television media and the industry practices of traditional broadcasters. The digitalisation of audiovisual content and the technological advances have facilitated the appearance of new players in local television markets creating audience fragmentation, not only due to the increase in the number of free-to-air and pay-TV channels but also by the creation of new services such as VoD platforms. Furthermore, the international economic crisis, which started in 2007-2008, has also deeply affected the local corporations in terms of advertising revenue and budget capacity.

Despite still being the hegemonic method of television consumption and the only media capable of reaching a local mass audience, free-to-air general-interest channels have had, and still have, to adapt to the new landscape. They have to compete more actively for the attention of viewers and maintain revenues in their markets, these changes influencing all aspects of the local broadcasting corporations.

Therefore, the acquisition process of local broadcasters is also directly affected by the changes in the international television sector since it filters the trends and transformations into the local market. After the evaluation of the results it can be argued that the current context has five main consequences on the acquisition process of local broadcasters.

Firstly, the multiplication of platforms and the digitalisation of content has given rise to an exponential increase in audiovisual content available worldwide not only by traditional exporters but also by new markets trying to place their own products in foreign markets by generating an international style. Still, there is stronger competition for purchasing imported programmes in the local markets of Spain and the UK since content is required by more players for their linear schedules and catalogues. In addition, not all programmes produced by transnational players such as Netflix, HBO or Amazon are available to traditional broadcasters to purchase since those platforms retain exclusivity rights for each local market. At the same time, viewers have more options than ever.

Secondly, technological advances have facilitated the rise of international television flows. Nevertheless, local television markets are still under the sovereignty of states despite the increasing difficulty in preventing the permeability of borders.

The next consequence is that all the changes in the television sector have demanded a growing specialisation from the Acquisitions Executives role. This has standardised the acquisition process not only within the corporations of each local market of the sample but also among countries and types of ownership.

Fourthly, the high levels of competition have compelled corporations to act in a more conservative manner with their purchasing decisions. Therefore, greater consideration is taken before deciding which content to acquire to best secure audience success and to achieve profitability.

Lastly, while at the beginning of digitalisation imported programmes, especially US Serialised Fiction, signified a distinctiveness for the general-interest schedules, currently their presence on multiple platforms and channels has saturated both markets, especially in the case of Spain. In addition, it has resulted in a higher homogenisation of the schedules in terms of the presence of international programmes.

Overall, the present and future qualitative role played by imported content in the general-interest channels should not be overlooked. Currently, the increasing of flows between territories, not only audiovisual but of people, ideas and economic, cultural exchanges should be at the centre of the social and cultural functions of television. General-interest channels, with their mass appeal, are capable of creating a trend to increase the diversity of genres and sources of imports viewed by local audiences to further cultural contact. Moreover, public channels should act as examples by enlarging the number of sources and types of products imported, not only on secondary channels but on main ones too.

Future research

To conclude, we consider that this research opens the possibility of future studies. A natural progression would be to implement this methodology into additional television markets in order to enlarge the countries of the sample to evaluate if the similarities found across Spain and the UK are exportable to a wider range of territories. At the same time, an analysis of the portfolio channels of the sample included in this dissertation would help to frame a broader analysis of each of the corporations. The comparison between general-interest and portfolio channels would especially be interesting in identifying the differences in genres and origins and to confirm that in the latter corporations include a wider variety of imported productions, particularly in the UK.

Furthermore, the analysis of the process that local Acquisitions Executives follow when acquiring international content is not only interesting to explain part of the cultural and economic forces behind transnational television flows but could also assist local production companies in understanding how to facilitate the sale of products to other territories. Related to this, as mentioned previously, one of the findings of this study is that Acquisitions Executives value those products that have an international style. Therefore, it would be interesting to analyse the aesthetics and narrative characteristics of those scripted products present in a significant number of local television markets to be able to identify if, in fact, there is a common style.

Lastly, another aspect that could be considered for future research is analysing the opposite player to local acquisitions departments, international distributors. Their point of view would complement and enlarge the findings encountered in this study and would help identify the overall forces of transnational television flows.

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