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ECONOMIC WEIGHT OF MEDIA IN CATALAN, BASQUE AND GALICIAN LANGUAGES: MINORITY LANGUAGE MEDIA AND THEIR FINANCIAL IMPACT IN SOCIETY

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Abstract
This paper is a comparative study that investigates the economic volume of monolingual media systems in Catalan, Basque and Galician languages. It can be framed within the fields of media economics and minority language media. It departs from mainstream scholarly approach and goes into the little known Europe of three autochthonous minority language media. The three communities sum a speaking population of about ten million individuals and are mostly sited in Spain (The Catalan and Basque languages also have part of their community in France). Questionnaires, field interviews and annual financial reports have been used to obtain results on the economic weight of the media systems along several variables (media type, ownership and diffusion level) as well the investment ratio per speaker that can drawn from that economic volume.
Key words: European Minority Languages, Media, economy, economic weight.

Introduction

Any community[1] needs a vigorous media system to carry out the crucial roles of information, communication, public opinion and identity/community building. Vigour, in this rationale, should be interpreted as a sustainable reality of news organizations, quality content, effective audience reach and media economy, among other elements.

This necessity of sound media systems is perhaps even more acute in the case of minority language communities, as they usually have serious limitations in many social and cultural remits. Thus, the roles of minority language media go beyond the aforementioned ones and are relevant for the preservation and expansion of the threatened language.

Given the key role of economy in communication, in this paper the authors study the economic weight of the monolingual media systems in Catalan, Basque and Galician languages; three communities that sum a speaking population of 10.2 million individuals. This evaluation of the economic value of those media systems can serve as indicators of the degree of media development in each of the three languages.

In the scholarly literature there are few comparative studies dealing with minority language media of several communities and even fewer focused on the economy and financing of media[1], which underlines the pertinence of this research, a follow-up to previous studies conducted by this same team of scholars regarding media systems and journalists in those languages.

During the last decades, the European Union has developed a series of policies aimed at the preservation of European values and culture, specifically cultural industries, in front of foreign products, especially those coming from the USA. Nevertheless, when talking about diversity, the European Commission and the Council do not take into account linguistic communities but States, which conceals the real meaning of diversity. In this study, precisely, the unit of analysis is not the state but three linguistic communities that are spread over Spain and France.

Literature

Economic crisis and media

Media financing and economic crisis. In the context of the current international financial and economic crisis, the media, as any other sector of economy, have also been affected by instability. From around 2009, scholarly literature and current affairs reporting put their focus on the incidence of the crisis in the media sector.

Rosario de Mateo (2009) summed it up as follows: “the economic crisis in media companies has manifested itself in a decrease of advertising revenues, price decline in the stock market, indebtedness, fall of information and communication consumption, and employment reduction”. This situation reaches all type of media, whether they are public or private, of general or local reach. As an example, Radiotelevisión Española (RTVE) has carried out workforce reduction and the same has happened among private channels and cable providers (Herreros, 2009:10).

There is agreement that, in these circumstances, the press sector has been affected the most by budget cuts and revenue losses. In Spain it is estimated that in 2008 and 2009 the drop of advertising in press has reached 800 million Euros (Vargas, 2010: 96). This effect may have been even greater at local and regional level. According to Farias and Roses (2009) the regional press has lost 22.5% of advertising income and local television, where the economic crisis concurred with the transition from analogue to digital, 25.5%. Juan Varela (2011) indicated that Spanish regional and local newspapers have been hindered by the drop of advertising and by the lesser ability to achieve a return on their web sites and digital editions.

In the field of television, the digital switchover has brought up new difficulties for obtaining licenses and managing local channels. According to Manuel Camp (2010: 182) “the local digital terrestrial TV model is unsustainable” and recalls the concept of “broadcasting buble” in parallel to the real state bubble since there are 92 DTTV licences in Catalonia and 200 in Andalucía.

On this severe reduction of the so-called advertising pie, the coexistence of public and private media within a system of commercial competition poses a political challenge to the media of some communities, such as those of minority languages. Big media corporations of Spain demand that regional public radio and television companies remove all advertising from their programming, as the state-owned public corporation of RadioTelevisión Española (RTVE) did, and get all their financing from public/government budget (González, J., Onda Cero, 2010: 134).

In the European context, “about half of the media employees (46.9%) are under budget cuts and almost one quarter (21.9%) face workforce reduction” and it seems that journalists of Southern Europe have been more affected than their counterparts in the North (Moreno et al., 2009: 101).

[1] We are very grateful to editors and finance directors of the media outlets of the three communities under study as well as to officials and executives of institutions that offer public aid to minority language media for their generous co-operation in this study

Incidence of the crisis in minority language media.
The economic recession has also affected minority language media and there are frequent news reports linking the closedown of important outlets to the decrease or cancelation of public aids, or about decisions made by institutions or regional governments bringing public broadcasting channels to closure.

In the Catalan linguistic community, for example, the Council of Majorca decided in the summer of 2011 the shutting down of the corporation *Radiotelevisión de Mallorca*[2]. The university of the Balearic Islands warned the decision implied a noncompliance with the Catalan Language Act[3]. In the Basque community, along 2011, many Basque language media organizations voiced their concern about insufficient public aids and 80 of them signed a common statement urging the government and other public institutions to provide substantial economic support.[4] With respect to the Galician community, along 2010 and 2011 several media outlets publishing in their own language were also closed down due to public aid reduction: *Chuza* and *Vieiros.com*, two only-online news outlets, and the online version of the newspaper *A Peneira*[5]. But even more dramatic was the cancellation in 2011 of *Galicia Hoxe*, the only daily newspaper in Galician, attributed to heavy reduction in public funding. [6]

1.1 Classification of minority languages
In terms of regulation, The European Council passed in 1992 The European Charter for Regional and Minority Languages. It entered into force in 1998 and has already been ratified by 23 nation-states.

The European Bureau for Lesser Used Languages (EBLUL 1999), set up by the European Parliament in 1982, established a five-category system to classify minority, regional or lesser used languages. The five categories are: 1) National languages of small nation-states which are lesser-used or threatened, as it is the case of Irish; 2) Languages of communities residing in a single nation-state, as Breton, Galician and Welsh; 3) Languages of communities residing in two or more nation-states, as it happens with Basque and Catalan; 4) Languages of communities, which constitute a minority in the nation-state in which they live, but are majority languages in other countries, as with German minority in Belgium, Turkish in Germany, Croatian and Slovenian speaking communities in Italy and Austria, among others; and 5) Non-territorial languages, which are traditionally spoken in one or several nation-states, but can not be identified with a particular area, as the Romany language.

In this study the ten languages under analysis belong to categories one, two and three.

1.2 Media and sociolinguistic structure of the three communities
The *Catalan language community* is sited in three regions of Spain (Catalonia, Balearic Islands and Valencian Community), the state of Andorra, Catalunya Nord in Southern France, a few valleys of Aragon in Spain and the city of Alguero in the Italian island of Sardinia.

It is estimated there are 7.2 million (55.5%) Catalan speakers out of a total population of around 13 million inhabitants, of which 6.2 million live in Catalonia, 5.1 million in the Valencian region, 1.1 million in the Balearic Islands and less than 0,1 million in Andorra.

Catalan is the only official language of Andorra, and it is co-official in the three mentioned regions of Spain.

As for 2009, the estimate was of 796 monolingual media outlets in total, including magazines, newspapers, radio and TV channels, most of them located in Catalonia. In regard to major media organizations of general content and diffusion and daily publishing/broadcasting, there were 25 outlets (5 dailies, 8 weeklies, 6 radio and 6 television stations).

The total number of full-time journalists working in Catalan language media was estimated to be 3,952.

The *Basque language community* is located in two regions of Spain (Navarre and the so-called Autonomous Community of Euskadi) and one of France. The former have their own regional governments with certain degree of autonomy but the latter, even though it is known as "Pays Basque" in French, does not have any specific administrative institution for its own population and it is embedded within a larger region.

The population in 2009 was estimated in 3.1 million inhabitants: 2.2 million in Euskadi, 0.6 million in Navarre and 0.3 million in the provinces of the French part.[7]

It is estimated there are 0.8 million Basque-language speakers, which represents 28% of the population. The Basque language is co-official in the whole Autonomous Community of Euskadi, but only in one small area of Navarre. In the French area it is not official at all.

As for 2009 the Basque language media system consisted of 108 monolingual outlets, of which 64.8% were in the print press sector, 28.7% in radio and 6.5% in television.

The number of major media organizations of general content and diffusion amounted to six outlets: one daily newspaper, one radio channel, one TV station and three weeklies of general information and diffusion.

The total number of full-time journalists was estimated to be 633.

The *Galician language community* is mostly placed in Galicia, a historic region of North-Western Spain. There is a population of 2.7 million of which 2.2 million (81.5%) speak Galician. It is co-official along with Spanish.

As for 2009, the monolingual media system was comprised of 45 outlets, with the radio sector (66.7%) holding the lead. There were three major news organizations: one daily paper, one radio and one TV channel. In 2011 the daily newspaper Galicia Hoxe was closed down.

The total number of full-time journalists was 464.

Research questions
1st RQ: What is the economic weight of the monolingual media systems in the three linguistic communities and what type of comparative analysis can be made?
2nd RQ: How is that economic volume distributed according to the variables of type of media, ownership and diffusion level?
3rd RQ: What is the economic investment, in terms of Euros, allocated to each speaker and what are the differences among the three communities?
4th RQ: To what degree did the aggravation of the economic crisis between 2007 and 2009 affect the revenues of the media outlets, that is, between the initial year the year in which the crisis intensified?

Methodology
To carry out this research the authors made use of questionnaires and field interviews to directors and financial managers of the Catalan, Basque and Galician media organizations, and analyzed the balance sheets and financial reports of the companies. This paper investigates two independent variables: economic weight or volume and inter-annual comparison of revenues.

This paper concentrates on *monolingual media organizations*, operationally defined as those outlets (newspapers, magazines, radio and TV channels) with 70% or more of their content in the minority language; published or broadcast with a frequency lower than one year (daily, weekly, monthly and six-monthly for example); with general or specialized content; and local or general diffusion level.

Variables. The variables under study are the *economic weight* or *volume* and the *inter-annual comparison of revenues*. Economic weight was operationally defined as the sum of all types revenues (advertising, sales, public aid, and other sources), expressed in Euros, as they appear on the annual statement of revenues and expenses. The data were been obtained directly from editors and financial directors of the media organizations. In other cases we made use of annual reports and balance sheets. As for the inter-annual comparison of revenues, total income of 2009 (in a few cases, due to contingent reasons, data were of 2010), a year in which the economic crisis aggravated, were compared to those of 2007, when the crisis set out.

The dependent variables were media type (print press, radio and TV), ownership (public, private and social or non-for-profit) and diffusion level (local and general reach).

Period. The year of reference is 2009 and the balance sheets of the vast majority of the media outlets belong to that financial year, except a few cases (less than 4%) in which, due to diverse circumstances, the financial statements were of 2010

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Questionnaire. Since this study about the economic volume is part of a larger research project on financing of minority language media, the questionnaire consisted of nine open-ended and closed-ended questions around the following areas: current financing system; funding problems, shortages and necessities; effects of digitalization; and design of a new funding structure to reach an adequate and sustainable development.

In each of the three communities the informants were the financing directors and/or other high rank executives of the media organizations.

Media universe. Based on previous studies conducted and published by this same research group (Zabaleta et al. 2010a, 2010b) it was estimated that in 2008 the total universe of monolingual media (papers, magazines, radio and TV channels with 70% or more of their content in the autochthonous language) in the three minority languages comprised 949 outlets, of which 44.4% (421) were print press; 37.8% (359) radio; and 17.8% (169) television.

With regard to ownership, 46.1% of all the media organizations of the three communities were public, 32.1% private and 21.7% social, that is, owned by non-for-profit organizations. Looking at the variable of diffusion, 87.1% of the outlets were of local (town, county) and 12.8% of general diffusion (linguistic or political community).

By communities, it is estimated that as for 2008 there were 796 media outlets in Catalan, 108 in Basque and 45 in Galician.

Sample and census for the economic weight. To calculate the economic volume of the media systems two different methodological criteria were used: sample and census. In the case of general diffusion media of the three communities the census of media outlets was researched and, therefore, not having used any sample, the total estimate of the economic weight reflects their reality.

In regard to local media, a specific sample of stratified nature and with random selection of elements was designed. For that task the variables of media type, ownership and diffusion level were considered. This way, the final sample of local media was composed of 63 outlets, distributed the following way: 26 Catalan, 24 Basque and 13 Galician.

The procedure to estimate the economic volume of local media involved the calculation of the annual average income of each outlet participating in the sample and then multiplying that figure by the total number of existing local media organizations, a census already known as it has been indicated. The result of that arithmetic operation was an estimate of the economic weight of local media in each of the three communities.

In short, considering that with general diffusion media it was used the census and that those type of media absorb over 85.8% of the total economic volume, we can establish that the global error level of the estimates presented in this paper will be less than 3%.

Sample for the inter-annual comparison of revenues. To compare the total income of the media outlets in 2009, when the crisis heightened, with that of 2007, its initial stage, a sample of 92 media organizations was set up for the three communities. That sample was extracted from the media census elaborated by this research group in 2008 (Zabaleta et al. 2010a, 2010b). In each of the three language communities a specific and stratified sample of randomly-selected outlets was prepared, considering the three variables mentioned before (media type, ownership and diffusion). The 92 items were distributed the following way: 40 Catalan, 30 Basque and 22 Galician media outlets.

Results

The main results of the paper provide (1) the economic weight of the media systems in the three language along the variables of media type, ownership and diffusion level; and (2) the investment ratio per speaker that can drawn from that economic volume. This way we can make comparisons among the attention (in terms of millions of euros) given by the three communities to their speakers and draw potential conclusions about the implications for the community and language development.

Finally, it will be interesting to observe the impact of the economic crisis on the revenues of the media organizations at two precise points of the economic crisis.

Economic volume according to media type

Taking the three language communities together, in 2009 the total amount of money invested in their own media was over 1,148 million of Euros. This noteworthy figure represents the total revenues of those media organizations and is an indication of the strength of that social and economic area.

According to media type, 73.3% (842,197,722 €) belongs to television; 13.3% (152,291,502 €) to radio; and 13.4% (153,887,306 €) to press. Thus, radio and press are similar with an annual revenue over 150 million Euros. Therefore the economic volume of the television sector, close to 850 million Euros, is about two times higher than radio and press together.

Table 1: Economic volume according to media type (in Euros and %)

	Press		Radio		TV		Total		
Catalan	126,833,213	14.2%	123,175,260	13.8%	644,071,400	72.0%	894,079,873	100%	77.9%
Galician	5,276,536	3.8%	13,442,000	9.7%	119,639,680	86.5%	138,358,215	100%	12.0%
Basque	21,777,558	18.8%	15,674,242	13.5%	78,486,643	67.7%	115,938,442	100%	10.1%
Total	153,887,306	13.4%	152,291,502	13.3%	842,197,722	73.3%	1,148,376,530	100%	100%

Source: Compiled by authors. Figures in Euros.

Inter-community comparison. As it can be seen in Table 1, there are relevant differences among the communities. The Catalan language media system stands out with an economic volume of 894 million Euros, which represents 77.9% of the total of the three communities. This large figure also seems to indicate that in some geographic areas and provinces (Girona, for example) the language and the media system are quite normalized and developed, but looking at the whole community the "minoritiness" of the Catalan media still remains a fact.

Going back to the other two communities, in 2009 the Galician media system had an income of 138 million Euros (12.0%) and the Basque almost 116 million (10.1%). Their difference (22 million of Euros) does not seem large at first glance and even it seems that the Galician system is in a better position, but actually their media systems differ notably in a series of variables such as the number of media outlets and full-time journalists. Thus, the Basque language media system has 108 outlets (print, radio and TV) and 650 journalists while the Galician system comprises 45 outlets and 464 journalists (Zabaleta et al. 2010b).

Media type. As it has been said, the TV sector absorbs most of the money: 67.7% in the Basque, 72.0% in the Catalan and 86.5% in the Galician media system. A straightforward analysis indicates that Basque and Catalan percentages are reasonably equivalent since their mutual difference is lower than 5% and their percentage mark can be laid at about 70%. On the other hand, it is noteworthy to see that the percentage of Galician language TV rises more than fifteen points over the Basque and Catalan figures and absorbs almost all the money invested in Galician language media.

In print press the pattern is similar to that of the TV sector: Catalan and Basque percentages with similar figures and Galician differing notably. Thus, the economic weight of press is 18.8% in the Basque and 14.2% in the Catalan language media system. Again their difference is lower than 5% and their average percentage mark could be set at about 16%. In the Galician language media system, in contrast, print press only gets 3.8% of the total economic volume.

As for radio, pattern differences are not so preeminent and the three communities show certain degree of similarity, with differences lower than 5%. Thus, Catalan and Basque language radio reach 13.8% and 13.5% of their respective total economic volume and the Galician radio 9.7%.

Therefore, one can conclude that the Catalan and Basque language media systems have notable similarities with respect to the distribution of their economic volume by media type and that the Galician media system differs in TV and press and less on radio. Indeed, it is striking how much money is devoted to Galician television and quite little to print press, which can be taken as a symptom for further analysis.

Economic volume according to media ownership

On the whole, in 2009 84.4% of the total economic volume of the three communities (969,580,551 €) was placed in the public media sector; 14.2% (163,607,385 €) in the private; and 1.3% (15,313,739 €) in socially owned media. These data clearly shows that most of the economic volume of minority language media is in the hands of public media.

However, we should voice a word of caution on the interpretation of those data since it does not mean that 84.4% of the economic volume is public money given by governments and public institutions. Indeed, all types of media (public, private and social) have other sources of income in addition to the public financing they may receive: advertising, sales and other inputs (sales of programming and/or broadcast rights on radio and TV, fund-raising activities in social media, etc.).

In fact, in accordance with our calculations and taking into consideration the whole media systems (every press, radio and TV outlet included) of the three communities, 72.4% of all the income comes from public funds, 18.3% from advertising, 2.1º% from sales and subscriptions, and 7.2% from other sources.

Table 2: Economic volume according to media ownership (in Euros and %)

	Public		Private		Social		Total	
Catalan	747,780,342	83.5%	142.620.295	15.9%	5,153,251	0.6%	895,553,887	100%
Basque	89,084,278	77.1%	16.630.335	14.4%	9,855,342	8.5%	115,569,954	100%
Galician	132,715,931	96.6%	4.356.756	3.2%	305,147	0.2%	137,377,834	100%
Total	969,580,551	84.4%	163.607.385	14.2%	15,313,739	1.3%	1,148,501,675	100%

Source: Compiled by authors. Note: Grand total figures that are on Table 1 and Table 2, 1,148,376,530€ and 1,148,501,675€ respectively, differe very slightly: 125.145 € (0,01%). The difference is because in the case of local media we used a sample rather than the census and that fact inevitably produces little variations on their respective totals.

Inter-community comparison. Again, comparing the three communities some relevant differences show up. It can be asserted that almost the whole economic volume (96.6%) of the Galician media system is placed in the public sector.

Similarly, in the Basque and Catalan communities public media organizations hold the vast majority of the economic weight (83.5% and 77.1% respectively). But beyond that differences appear among them. In the Catalan community almost all of the remaining percentage (15.9%) belongs to private media while in the Basque community private media seizes 14.4% and social media 8.5%.

Economic volume by media diffusion level

It is generally acknowledged that, in any community, a well developed and balanced media system should not only have a varied group of media outlets of general diffusion and content (daily papers, weeklies, radio and TV channels reaching the whole community) but also a quite numerous and diverse group of local news organizations, albeit with limited economic weight usually.

Table 4 shows that, as for the three communities, general diffusion media (including those of general and specialized content) take 85.8% of the total economic volume and local diffusion outlets 14.2%.

Table 3: Economic volume according to diffusion level (in Euros and %)

	General		Local		Total	
Catalan	749,057,108	83.6%	146.496.779	16.4%	895,553,887	100%
Basque	101,770,072	88.1%	13.799.882	11.9%	115,569,954	100%
Galician	135,158,333	98.4%	2.219.501	1.6%	137,377,834	100%
Total	985,985,513	85.8%	162.516.162	14.2%	1,148,501,675	100%

Source: Compiled by authors.

Making comparisons, one can observe that Catalan and Basque media systems keep similar values in both categories and, thus, the percentages of general diffusion media are 83.6% (749.1 million Euros approx.) in the Catalan and 88.1% (101.8 million Euros approx.) in the Basque community, that is, a difference less than 5%. The dissimilarity comes up with the Galician community where general diffusion media attract 98.4% (135.2 million Euros approx.) of the total economic weight and only a tinny 1.6% (2.2 million Euros) of money is invested on local media.

Ownership and diffusion intersection. Going deeper into the analysis, it is also important to see how the variable of ownership interacts with the variable of diffusion.

As seen in Table 5, taking the three communities together, 87.8% of the economic volume of general diffusion media is in the hands of public news organizations, 11.7% in private and 0.4% in social hands. Therefore, social media of general diffusion has very little economic size (0.4%) and this reality is similar in the three communities.

But in the sector of local diffusion media differences between public (63.8%) economic volume and private (29.4%) decrease notably. Again social media only get a 6.8% with respect to the total volume of the three languages.

Table 4: Ownership variable distribution on general and local media (%)

	General diffusion media (%)				Local diffusion media (%)			
	Public	Private	Social	Total	Public	Private	Social	Total
Catalan	86.4	13.3	0.3	100	68.5	29.5	2.0	100
Basque	85.9	12.4	1.7	100	12.3	28.9	58.8	100
Galician	97.0	2.8	0.2	100	74.4	22.9	2.7	100
Total	87.8	11.7	0.4	100	63.8	29.4	6.8	100

Source: Compiled by authors.

Making inter-community comparisons, the pattern described before still holds in the category of general diffusion and Catalan and Basque media present similar weight distribution (86.4% and 85.9% respectively). Galician media is overwhelmingly dominated by public outlets, which get 97.0% of the economic weight.

But a pattern change appears on local media since it is the Basque community the one that differs. Indeed, while 68.5% and 74.4% of the economic volume of local Catalan and Galician media is in the hands of publicly owned outlets, in the Basque community it only reaches 12.3%. The reverse side of the coin is on the category of local social media where Basque outlets have 58.8% of their economic weight and Catalan and Galician media 2.0% and 2.7% correspondingly. Finally, private local media have similar percentages in the three communities, between 22-30%.

Economic weight per speaker

Previous results and figures were of general nature, linked to the economic weight of entire media systems with respect to the whole population of minority language speakers but going a step further in the analysis it's also important to calculate how much money is invested on each speaker. This way we can make more meaningful comparisons among communities.

Table 5: Relative economic weight per speaker variable distribution on general

	Population	Number of speakers	% of speakers	Economic volume (€)	Investment per speaker
Catalan	12,900,000	7,200,000	55.8%	894,079,873	124
Basque	3,091,400	863,000	27.9%	115,938,442	134
Galician	2,700,000	2,200,000	81.5%	138,358,215	63
Total	18,691,400	10,263,000	54.9%	1,148,376,530	112
Average					107

Source: Compiled by authors.

Taking the three communities together and doing a simple division in which the economic volume (1,148 million Euros) is divided by the number of speakers (10.2 million speakers), the answer is 112 Euros per speaker/year. That result means that among the three communities (only?) 112 Euros of the revenues of the media organizations were devoted to each speaker.

By communities, the Catalan and Basque realities are again similar since the former invest 124 Euros/speaker and the latter 134 Euros/speaker. The Galician community shows again signs of economic weakness for only 63 Euros are assigned to each Galician speaker.

Income differences during crisis (2009-2007)

The start of the current European economic crisis can probably be dated in 2007, when the American financial crisis, triggered between 2005-2006 by its subprime mortgage disaster, expanded and became an international financial crisis that shook banks of Europe and other regions. That financial situation worsened in 2008 and banks like Lehman Brothers collapsed. In 2009 the financial crisis extended to other areas of society and became a general economic crisis that severely affected Europe, but much less other parts of the world. Therefore, 2007 could be labelled as the start-up year of the economic crisis, 2008 as the follow-up and 2009 as the year of critical explosion.

On the other hand the media sector was under its own *prolonged and systemic crisis* that began in the 1990s and was caused by the advance of Internet and the digitalization of content production, distribution and reception. The most evident consequences of that systemic crisis have been and are the loss of advertising and sales revenues among traditional media outlets (press, radio and TV) and the reduction of the workforce, on the one hand, and the growth of online media, services, advertising and audiences on the other.

Thus, in the period of 2007-2009, two different crises coincided and merged: the general economic and the media-specific crisis. Taking that temporal frame as a reference, financial directors and executives of media organizations were asked whether they experienced noteworthy income differences between 2009[8] and the previous two years, and, if so, on what areas (advertising, public aid, sales, others).

Results in Table 6 indicate that 61% of the people consulted answered that the 2009 income of their media outlet was similar to that of the previous two years, 31% notably lower and 8% notably higher.

Table 6: Income differences between 2009 and 2007

(1)	Similar	Notably lower (2)	Notably higher	Total
Catalan	63%	16%	21%	100%
Basque	78%	17%	4%	100%
Galician	41%	59%	0%	100%
Total general	63%	29%	8%	100%

Source: Compiled by authors. Notes: (1) Data belong to 2009 except in a few cases that are of 2010 but do not alter significantly the result; (2) In the questionnaire the adverb “notably” wasn’t specifically quantified but left purposely open to interpretation by informants so that they could express their perception of the economic situation. Anyhow, asnwers suggested that in most cases it could be set as higher or lower than 5% with respect to 2009.

By communities the percentages differ remarkably: 78% of the Basque media outlets indicated that their revenues in 2009 were similar to those of 2007, but that figure decreased to 63% among Catalan and to 41% among Galician media.

With respect to the category of “notably lower” income, 59% of the Galician, 16% of the Catalan and 17% of the Basque media outlets considered it was the case. Finally, the category of “notably higher” income in 2009 than in 2007 was mentioned by 21% of the Catalan informants and almost by none of the other two communities.

Looking into the factors behind those percentages, comments provided by the informants indicate that in the three communities the reduction of income was mainly due to the decrease of advertising. Beyond that, Galician and Basque people mentioned the reduction of public funding either directly or by diminishing institutional sponsorship and/or advertising.

As for the category of “notably higher” revenue in 2009 than in 2007 it is worth mentioning the 21% increase among Catalan media. The explanation behind it seems to be that some Catalan outlets received more public aid and, beyond that, increased their production and business output as a way to cope with the both systemic and the economic crisis.

Therefore, we can conclude that in 2009 the economic crisis had seriously hit the Galician media system but only partially the Catalan and Basque media outlets.

Discussion

Economic volume. The economic weight of the Catalan, Basque and Galician language media together reaches 1,148 million Euros, which constitutes a very remarkable figure. In fact it is almost identical to the annual budget of the Spanish public broadcasting corporation RTVE (Radio Televisión Española) whose income in 2010 was of 1,140 million Euros.[9] However, there are important differences among the three communities. Thus, as for the economic weight, the Catalan language media system takes in approximately eight Euros out of ten (77.9%, 894 million) and the Basque and Galician about one Euro each (12.0%, 138 million the Basque media system; 10.1%, 116 million Euros the Galician). Putting it another way, those values can be represented as a ratio scale of 8-1-1 approximately.

Wider interpretation frame. Those figures, interesting on themselves, could be better interpreted if we establish a more general frame where we compare that economic weight to other parameters like proportion of full-time journalists, media outlets and speaker population, as it can be seen in the table 7.

Table 7: Framing media system profiles

(1)	Economic volume % (million Euros)	Ratio	Journalists % (no. journalists)	Ratio	Media outlets % (no. outlets)	Ratio	Speakers % (million speakers)	Ratio
Catalan	77.9% (894)	8	78.3% (3952)	8	83.9% (796)	8.5	70.2% (7.2)	7
Basque	12.0% (138)	1	12.5% (633)	1	11.4% (108)	1	8.4% (0.8)	1
Galician	10.1% (116)	1	9.2% (464)	1	4,7% (45)	0.5	21.4% (2.2)	2
Total	100% (1,148)		100% (5049)		100% (949)		100% (10.2)	

Source: Compiled by authors. Notes: (1) Data of media outlets, journalists and speakers were obtained from a previous study by this research team (Zabaleta et al 2010b).

Looking at the ratio values of the table, we can observe that the ratio scales of the three media variables on the three communities are the following: 8-1-1 for the media economic volume; 8-1-1 for the population of journalists[10]; and 8.5-1-0.5 for the media universe[11]. Thus we can conclude that the Catalan and Basque media systems have practically the same ratio values along the three variables while the Galician system shows some imbalance between the economic volume and proportion of journalists on the one hand and the number of outlets on the other (less media outlets than expected).

Going a step further in our analysis, if we compare those three ratio scales with the ratio scale of speakers (7-1-2[12]) it seems clear that the Catalan and Basque media systems have higher ratios than their proportion of speakers. The Galician media system, on the other hand, presents lower ratio scales that the population of speakers. All this can lead us to conclude that the Catalan and Basque media systems have more balanced development than the Galician.

Profiles. But when we said that the 84.4% of the economic volume was in the hands of public media, it did not mean that all that volume came from public institutions. In fact, as we said before, only 72.4% of that money came directly from public funds (three out of four Euros in any case).

The general picture gets rounded when we see that 85.5% of the economic volume belongs to media of general diffusion, which highlights the limited economic muscle of local media. Yet, their importance is almost as crucial.

As a final picture we could say that most of the economic volume of the media in the three communities is in the hands of public television stations and that most of their money comes from public funding.

Investment per speaker. Given that among minority language communities practically all broadcast (radio and TV) programming of information and communication is offered by public radio and television channels of public ownership and general diffusion, it was considered pertinent to compare their investment per speaker with that of public broadcasting corporations of some important European countries. Thus, in the three communities, the economic volume of *public broadcasting* (radio and TV) of *general diffusion* amounted to 853.6 million Euros, which divided by 10.2 million speakers yield a relative investment of 83.7 Euros devoted to each speaker. That is a similar figure to that of Germany, where only public broadcasting, without considering private radio and TV stations, invest 88.4 Euros per person (data of 2007[13]). In the United Kingdom the BBC cost 89.3 Euros to each Briton (data of 2010[14]). In Spain, the Spanish public broadcasting corporation RTVE invested 24.7 Euros per Spaniard in 2010 but that small amount should be qualified by the fact that regional radio and TV broadcasting corporations that broadcast in Spanish have not be included.

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