The impact of EC communications policy in Portugal*

Helena Sousa
Universidade do Minho

1993

Table of contents

Abstract

This paper is about the impact of the EC communications policy in Portugal. Although this small country has traditionally kept itself independent from other Western states, a lot has changed since its entry into the European Community. Immediately after 1986, Portugal was pushed to change its telecommunications and broadcasting policies, according to the primary goals of the EC. First, it started deregulating the telecommunications sector; later, it open up two TV channels to private capital. Apparently, Portugal is following a widespread tendency towards liberalization. However, what we will argue here is that Portugal will not substantially benefit from this new regulatory framework. EC policies are designed to favour countries with a large manufacturing industry and with an efficient services sector (e.g. Germany and France). The impact of EC communications programmes for less favored regions (Star, Telematic, Media, etc) is very small compared with the potential profits of big European manufacturers, telecommunications operators and programme producers. Considering the Portuguese weakness in telecommunications as well as in broadcasting, it is likely that it will not be able to compete with European electronic manufacturers and programme-makers. An open market for terminal equipment, competition for all value-added services and free circulation of TV programmes is likely to increase the vulnerability of the Portuguese broadcasting and telecommunications system.

1 Introduction

The EC does not have a coherent and comprehensive communications policy. Both in terms of broadcasting as well as in telecom-

*Paper to the International Association for Mass Communication Research (IAMCR) Conference on Europe in Turmoil:Global Perspectives, June 24-27, 1993, Dublin, Ireland.

munications, the EC is paying much more attention to technology and electronics hardware industry than to the sociological and cultural aspects of these technologies.

Basically, the EC has an industrial policy1 towards communications. The main reason for this option is the EC obsession with competition. Telecommunications and broadcasting are fast growing sectors and are therefore expected to give Europe competitive advantage in relation to other regional blocs.

The decline of the traditional industries was so deep and complex that countries like France, UK and Germany felt they had to find new solutions outside the realms of normal economic managment. 'They are looking to new technology as a panacea. The developments in electronics are recognized as providing new markets of enourmous potential. Cable TV, satellites, telecommunications equipment and computers are the major growth areas' (Locksley in Marsh, 1983, p.129).

It is quite clear that the EC has been particularly concerned with the increasing competitiveness of Japan and the US. With few exceptions, EC electronics industries have declined in international competitiveness and lost global market share. In the 60's, Western Europe was in a reasonably good position compared with the US. But since then the technological gap has become increasingly evident.

Considering that Europe has to face a large foreign presence, a certain degree of technological backwardness and a lack of competitiveness, the Commission has plenty of motives to look for an industrial policy. However, we believe that this is not to the benefit of countries without a significant electronic industry, like Portugal. A communications policy, which is mainly an industrial policy, is not likely to favour Less Favoured Regions (LFR).

If Europe is to be competitive in the world market, it is Germany, France, Netherlands and the UK that will benefit. The UK has an important TV production industry and the other countries have the biggest electronic companies in Europe: Philips, Thompson, Siemens, Alcatel, etc.

In spite of that, there is a considerable difference between EC policies for telecommunications and broadcasting. The EC telecommunications policy of liberalisation and deregulation includes a regional policy that can be understood as a trade-off in favour of the LFRs for accepting competition in what used to be a 'natural monopoly'. Programmes like Star and Telematic have brought some benefits to Portugal, mainly in the upgrading of its network infrastructure. In terms of brodcasting, however, there is no trade-off in favour of Portugal. This country will simply open up its TV market without benefiting from it. A free flow of TV programmes like any other service or good will only favour countries with an important production industry. Due to the economics of programme production, Portugal has little success with its audiovisual products.

In this paper we will concentrate on telecommunications and broadcasting because these are the most important sectors of EC communication policy and because these sectors have the technological potential to come together into one electronic distribution system.

The paper will be divided in three main parts. First, we will give a general overview of Portuguese Communications. This section provides a brief description of the bro-

adcasting and telecommunications systems. The second section concerns EC communications policy. In this part, we will be mainly concerned with the policies which are most likely to have an impact on Portugal. Finally, we will analyse the positive and negative aspects of the EC communications policy in the Portuguese telecommunications and broadcasting systems.

2 An overview of the portuguese communications

Being small and kept apart from the rest of Europe, Portugal is still far from the EC core countries in terms of economic and social development. Portugal was ruled by a dictatorial regime between 1926 and 1974 which partly explain the slowness with which the country developed. A semi-presidential democratic system was established after the 1974-76 revolutionary period. Since then the country has been ruled by two main parties: the Social Democratic Party (liberal ideology) and the Socialist Party.

The most relevant economic feature is the extreme regional disparities that prevail within the country. In general terms, these differencies are clearer between the mainland and the islands (Madeira and the Azores); and - within the mainland - between the coast and the interior. Most of the urban centres are in the litoral and industry is also concentrated in the coastal line, particularly between Lisbon and Braga (in the north).

Since the entry of Portugal into the EC, a lot has been changing in economic and social terms. There is a clear intention to catch up with the rest of the Europe. Hence, there have been huge investments in the country's infraestructures. Telecommunications sector has also been an inportant recipient of investment, as it is expected to foster the country's economic growth.

In spite of the big investments in telecommunications and the restructuring of this sector, it has never been a sensitive political issue. There has been very little debate surrounding it. The public in general is concerned with the poor quality of the services, but is not aware of the structural changes in the sector.

On the contrary, the introduction of private television has been extremely controversial. The political control of Rádio Televisão Portuguesa (RTP), the state-owned television company, and the urgent need for alternative sources of information and programmes, has been source of hot debate throughout the 1980's.

3 Telecommunications

3.1 Portugal in contex

Before presenting the main aspects of the telecommunications sector, we will briefly present some figures which will put Portugal in the context of the OECD countries.

Portugal has a relatively low penetration rate of mainlines, 22.9 per 100 inhabitantes in 1990, which is just over half the OECD average and is lower than neighbouring Spain. This figure implies that approximately 5 people share each mainline. In spite of these low figures, Portugal has enjoyed high growth rates over the last decade (11 per cent per year, 1985-90), while some other countries with low penetration rates, like Greece or Italy, have slowed down in the catching up process (Kelly et al., 1992, p.2).

The Portuguese telecommunications market was worth US$ 1.5 billion in 1990, which is equivalent to 0.4 per cent of the total in OECD countries. The capital investiment in the public telecommunications network in Portugal grew from just under US$300m per year in the early 1980s to US$655m per year in 1990; a rate of growth of 10.8 pr cent per year (Kelly et al., 1992, p.4).

One of the most peculiar aspects of Portuguese investments in telecommunications is the difference between investment for modernisation and investment for network expansion. Almost half of Portuguese investment between 1980 and 1990 went towards expansion, compared with just one fifth for the OECD as a whole. 'The portuguese network has been 'growing fat' without necessarily growing strong' (Kelly et al., 1992, p.4).

This aspect helps us to establish a significant difference between Portugal and the EC core countries. While they all have a well developed basic infraestructure and are now focusing on advanced services, Portugal still has to continue making enourmous investments in its basic infraestructure.

In fact, the poor quality of the basic telephone service is still a big problem. Both domestic PTT companies (CTT and TLP) have long waiting lists for new installations. Once installed, the telephone service is prone to noise and interruption; 68% of TLP's customers registerd some kind of complaint in 1987, although this represents a decline from the earlier complaint rates of over 80%. Overall, the quality of telephone services is worse than that in other LFRs (eg Ireland and Italy) with the exception of Greece (Pye and Lauder, quoted in Case, 1990, p.292.

To overcome these problems, the government and the companies involved in telecoms are engaged in the creation of a digital network using optic fibre. Optic fibre is replacing metallic cable in trunk operations and the last analogue exchanges were installed in 1986. Nowadays, more than half of Portugal's exchanges are digitalised, and 80% of calls to Europe are carried digitally. Over 40% of the country's trunk circuits are optic fibre.

3.2 Structure of the market

Unlike most of the European countries, Portugal has never had a single PTT to control and operate all postal and telecom services. Traditionally it has been divided between three companies, each reporting to the Ministry of Public Works, Transports and Communications. The division between the companies (CTT, Marconi and TLP) was made on a geographical basis.

Telecom Portugal, formerly the telecom arm of Correios e Telecomunicações de Portugal (CTT), is responsible for telecommunications services throughout Portugal, excluding Lisbon and Oporto. Telecom Portugal also provides international telephone services to European and North African countries. Telecom is the less profitable of the three companies because of the high costs of providing service in sparsely settled parts of the country in which a single station may require 20 km to connect to a trunk line. CTT estimates that perhaps one-third of its total investment is unprofitable (Case, 1999, p.292).

Given the concentration of population and business activity in the two urban centres of Lisbon and Oporto, Telefones de Lisboa e Porto (TLP) operates only within these two cities. This company has its roots in a Bri-

tish firm that started operating in Portugal in 1882.

'Although their (TLP) service area encompasses a total of only 2955 sq Km (30- and 20-Km radii from the centres of Lisbon and Oporto respectively), these locations include 38% of the total population and 59% of the country's telephones' (TLP, annual report, 1987, quoted in Case, 1990, p.291).

Intercontinental services - operating outside Europe and North Africa - are provided by Companhia Portuguesa Rádio Marconi (CPR Marconi). Marconi provides international traffic by both cable and satellite. Created in 1926, it inaugurated its submarine cable station in 1969 and its first satellite earth station in 1974. Marconi is now participating in a major fibre optic development and is digitalizing its international switching service. This is the most profitable of the three telecommunications companies.

The three operators are being merged into a holding company - Comunicações Nacionais (National Communications) - controlled by the Ministry of Public Works, Transports and Communications. CN was officially created in February 1992, but its role and objectives are not yet clear. Mainly the government has been saying that the concentration it is to defend the interests of the state in the sector and to coordinate a global strategy for all operators. It had been argued that the telecoms sector was weakened because there was no single PTT to define a coherent national strategy. So, CN will probably try to enhance the potential of the operators to fight foreign competion. In addition, it could also have an important role in cordinating investments and the distribution of profits.

3.3 Advanced services

Private and public companies will certainly face considerable difficulties in the introduction of advanced services. The size of the country and the income per capita are disadvantages that the providers of services have to consider. In fact, Portugal is quite small in relation to all major industrial nations and its income per capita is a quarter of the European average. Even so, it is likely that advanced services will be an increasingly important part of the telecommunications sector and that if Portugal is to catch up with the rest of Europe, it will need advanced services to enhance the importance of the telecoms sector in the economy (Analysis, 1992, p.5).

The potential economic benefit of advanced services is well recognized, but in the case of Portugal the successful introduction of these services is not yet clear. 'The size of the potential market in Portugal could be too small to support a viable advanced-services market by itself, or there may exist a threshold in terms of average income, below which advanced services cannot be introduced successfully' (Analysis, 1992, p.6). The situation may look even more complex if we take into consideration the fact that basic services are not fully developed yet.

In spite of the potential difficulties, a wide range of new services have been created in recent years. Services like mobile telephone, Data Network, Video conferencing, among others, are being developed mainly for business use.

4 Broadcasting

4.1 Regulatory framework

Rádio Televisão Portuguesa (RTP) was granted the exclusive concession for television broadcasting in October 1995. The government, acting on the recomendation of a TV study committee, issued this exclusive license for twenty years, with a provision for extending it by consecutive periods of ten years, and an option for the government to purchase the corporation after its first ten years in operation.

RTP was a corporation whose shares were divided into three parts, held by the government, Portuguese commercial radio stations, and banks and other private companies. It was to be financed by a tax on receivers (this tax was recently droped) advertising revenue, and 10% of the tax on radio receivers. Its technical operations were to be regulated by the PTT, and its supervision was to lie with a Board of Directors partially appointed by the government. RTP started broadcasting from Lisbon in August 1956. In June 1966 it linked with Eurovision. RTP's status remained unchanged until the Revolution of 1974, when a new Constitution led to a redrafting of the 1955 Television Broadcasting Act. A further redrafting in 1979 changed RTP from a mixed ownership company to a public company. In spite of the pressure against the public monopoly throughout the 1980s, it was only in June 1989 that a constitutional change allowed private TV broadcasting in Portugal. This regulatory change was difficult to get through because constitutional changes can only be done with the approval of two thirds of the Parliament.

Currently, the two channels that RTP operates (RTP-2 started broadcasting in 1978) are financed by advertising and government subsidies. Around 70% of programmes broadcasted are produced out of the country. (This figure might increase with the new private channels). 'Production studios use equipment supplied by Bosh, Philips, RCA and Sony The home market for TV receivers is dominated by Philips, but also includes a strong share for the Portuguese subsidiaries of Sony and Sanyo' (Case, 1990, p.296).

4.2 Public service versus private channels

RTP is considered to be a Public Service Broadcaster (PSB), although its reals objectives as PSB have never been clearly defined. RTP has never been particularly concerned with the quality of its broadcasts and has never made a real investment in home productions. Almost all fictional content is from the US, the UK and Brazil.

Independence from the government, which is usually considered an important aspect of PSB, has never really happened. During the dictatorship, television was expected to serve the interests of the regime. After the dictatorship, successive governments managed to have political and financial control over the company and its output. In a recent speech, the minister with the oversight of Social Communication, Marques Mendes, presented the five most relevant aspects of the Portuguese PSB:

- To continue broadcasting to Europe, Africa and America through RTP International;
- To give voice to social, cultural or regional minorities;

- To cooperate with the Portuguese Speaking African Countries (Portugal has been setting up TV studios in these countries)
- To support to cinema production
- To give incentive to quality production (Público, 24th Nov. 1992, p.20)

This framework for the PSB is extremely vague and avoids all controversial issues like financial and political independence from the government, self-management and definition of quality production, among others. In general terms, the Portuguese PSB is controlled by the government and operates like any other commercial channel. There is no specific programming which could be identified as a public service. Sports and soap operas are very dominant in the programming. There has also been a steady increase in the number of foreign movies (although they tend to be quite recent and of good quality).

Advertising time is not subjected to clear rules. 'In 1989, RTP-1 transmitted 240 hours of advertising, corresponding to 4.1% of the total schedule. RTP-2 transmitted 45 hours of advertising, corresponding to 1.1% of the total schedule (Ferreira, 1992, p.188).

The arrival of two private TV channels is not likely to improve the quality of programming in general, although it will provide alternative sources of information. What is most likely to happen is that the four channels will increase the competition for audiences and advertising revenues.

Considering that in Portugal advertising as a percentage of the GDP is 0.4% (in the US, the figure is 1.6% and the European average is 0.9%), it is difficult to foresee the success of four TV channels supported mainly by advertising revenues. It is likely that financial hardship will not be favourable to the development of high quality programmes and a diversified schedule.

5 The EC'S commmunications policy

We have already stated that the EC communications policy has an enourmous industrial bias. Although most of the OECD countries have also heavily invested in communications technology, it can be argued that the case of the EC is very peculiar in a world-wide context. In global terms, Europe's position on IT, for instance, is not strong. Within the IT industry as a whole, the EC supplied a mere 40% of its own market and only 10% of the world market. This weakness is not recent but it was only in the early 1980's that the European Commission began to show a serious interest in electronics and IT.

Europe is now definitely engaged in a struggle for economic survival. And there is a belief that communications and its hardware industry are an important part of the solution. Hence, the EC is trying to achieve economies of scale both in broadcasting and telecommunications hardware. In this sense, communications are being used as a toll to foster the European economic recovery.

As we cannot cover all aspects of the EC broadcasting and telecommunications policy, we will only point out some aspects which are likely to have an impact on Portugal.

5.1 Telecommunications

In general terms, the Commission's policy on telecommunications goes back to 1970. At that time, telecommunications networks were considered natural monopolies. Manufacturers, operators and governments were satisfied with the situation. But the evidence of a technological gap between the EC and other regional blocs introduced some instability in the status quo.

Therefore, in 1973, the Commission started to show interest in aspects such as the opening of markets and standardisation of European PTT equipment. But the hostility of PTT's and governments was so strong that only in the mid-1980's was the Commission able to achieve some progress on liberalization.

Contrary to microelectronics and information technologies, the EC has traditionally been strong in the telecommunications sector. But the situation started to change in the early 1980's. With the liberalization and deregulation processes in the US and Japan, companies started turning to the international markets. Europe has become one of the major targets of American and Japanese telecommunications companies.

In this new context, the EC had to drastically reformulate its policies. Its traditional position in the telecommunications market has been eroded. In recent years, the EC has had significant import deficits with the US and Japan. 'No national Community market represents more than 6% of the world telecommunications market (the total Community market share is 22.4%); whereas the US represents 35% and Japan accounts for 11% (Ungerer, 1990, p.33).

This situation was considered particularly worrying because telecommunications were considered critical for the Community economic growth. 'In the Community by the year 2000, more than 60% of the Community employment will be strongly information-related - and will therefore depend on telecommunications' (Ungerer, 1990, p.89). In addition, telecommunications is currently estimated to account for 2% of GNP within the EC, with an estimated increase to 7% per annum by the year 2000 (Hills, 1991, p.123).

Some of these arguments gave the Commission the rationale to look toward the implementation of a Community market for telecommunications equipment and terminals. In spite of these arguments, if we do not examine the main beneficiaries of this process, it is difficult to understand the dramatic liberalization, since the mid-1980s. It seems that the main beneficiaires of the EC liberalization programme on telecommunications are the electronic manufacturers and the big users (big business, transnational companies, among others). It is well recognized that manufacturers need community-scale markets in order to compete with the US and Japan. National markets for some telecoms products (eg. public exchanges) were too small to support competition.

Big business was also pushing for liberalization because there was a belief that, without better communications, European companies would be at a disadvantage. By the mid-1980s, American firms could benefit from more advanced telecoms facilities at lower prices than were available to their European counterparts (Sandholtz, 1993, p.247).

Hence, although it can be argued that Europe was losing ground and liberalization was inevitable to expand the market and the

revenues, it is quite clear that very concrete interests were behind the move. The opening up of EC-wide competition in the markets for network equipment, terminals, and telecommunications services is not designed for the benefit of LFRs.

What the Commission did do, however, was to put forward telecoms programs which would help countries like Portugal to upgrade their infraestructure and to introduce advanced services. STAR and Telematique are the best examples of the trade-off between the Commission and LFRs for opening-up their telecoms market.

From 1987 to 1991, some 200 million dollars were spent in launching digitalisation and advanced services, and the EC contribution amounted to 130 million dollars (APDC, 1993, p.16). These figures are substantial for a small country like Portugal, but insignificant if we take into account the profits which liberalization is bringing to big European manufacturers.

In parallel with the EC liberalization programme goes standardization of telecommunication equipment. It is, in fact, one of the basic conditions for the completion of this market. Standardisation provides inter-operativity of equipment, investment certainty, larger production runs and lower costs. In sum, standardization, allows the expansion of markets.The exploitation of the European market of 340 million people will provide suppliers with economies of scale in order to face American and Japanese competition.

5.2 Broadcasting

The European Commission made its first intervention in the broadcasting sector in 1982, when the European Parliament required a report on that issue. But the real milestone in the Commission's intervention is the Green Paper of 1984, Television Without Frontiers (TWF). In this document, the Commission defended the free flow of TV programmes as any other service or good. 'In the Community, the free movement of goods extends to video cassettes and discs as economic assets in the same way as it does to sound cassettes and records. As a rule, therefore, films, television recordings and the like may circulate without restriction in the Community' (Commission, 1984, p.11). It is important to note that the emphasis in the TWF Green Paper is on private sector broadcasting rather than on public service broadcasting. This is due to the Commission's desire to justify its competence in relation to broadcasting and to liberalize monopoly sectors.

The harmonization of national regulation is another major issue in the EC broadcasting policy. According to the Commission, harmonization should be done in at least four areas: advertising, protection of children and young persons, right to reply and copyright.

With this harmonization, the Commission is willing to ensure that programmes respect certain standards of taste and decency. Otherwise, it would be impossible to exchange programmes within the Community without negative cultural shocks.

In TWF, it also expressed the importance of technical standardisation for the implementation of the common market in the broadcasting sector.The emphasis on technical standardisation and on the harmonization of national regulations are related to the urgent need of achieving economies of scale. Expansion of markets is a pre-condition for suc-

cess in the equipment industry (hardware) as well as in the production industry (software).

Once reproduction of audiovisual products is extremly cheap, there is a strong incentive to gain the biggest possible audience. "The marginal cost of serving additional customers can approach zero in television"(Locksley, 1988, p. 143).

In addition to the economies of scale, one can also talk about economies of scope2 in the audiovisual production industry. Economies of scope have significant implications in the structure of the industry. The point is that to take advantage of economies of scope, companies must have access to all the appropriate sub-market. Small firms can hardly expect to be successful in this race.

Because it is very difficult for small firms to take advantage of economies of scope, it is not surprising that the audiovisual market is dominated by multimedia companies. It is not surprising either that the EC is looking foward to the harmonization of national regulations in broadcasting policy.

Hardware broadcasting and telecoms industries work differently from that of programme production, mainly because the products have different characteristics. Contrary to programme production, the reproduction costs of the equipment industry are very real. Nevertheless, the importance of economies of scale is recognized in both cases.

6 EC policies and Portugal: analysis and conclusion

From what has been said about EC broadcasting and telecommunications policy, it is clear that EC policies are not designed for LFRs. They are conceived to support the European industrial giants to fight foreign competition. The EC is more concerned with being able to compete on a world-wide basis than to close the economic and technological gap within the community.

In terms of telecommunications, Portugal is in a weak position. It has a relatively low penetration rate of mainlines and there is still alot to be done for the modernization of the network infraestructure. Advanced services are also being introduced very slowly.

Because Portugal does not have the economic potential to develop an important electronic industry, and because it does not have efficient basic or advanced services, it will be very difficult for it to profit from the most important telecommunications policies. They are for the best to become even better.

In telecommunications, however, Portugal is taking some advantage from special programmes for LFRs like Star and Telematique. In contrast, in terms of broadcasting policy there is no trade-off in favour of Portugal for opening its market.

Foreign productions will enter the country with even more ease. Having an important TV production industry, the UK is likely to be one of the European countries which will benefit most from the new EC regulations. In general, Portuguese productions are very poor, and for historical and cultural reasons, there is no resistance to foreign products.

Hence, once it is much cheaper to buy foreign productions rather than making their own investments in ‘home’ productions, it is likely that Portuguese TV channels will not consider any increase in national productions.

It could be said that the new regulatory environment will erode the Portuguese cultural autonomy. But Portugal itself is not very

keen in protecting its cultural sovereignty. Successive governments have payed no attention to the cultural aspects of television.

It is well known that the economics of television are not favourable to small countries. But we are convinced that the implementation of EC regulations will reinforce existing tendencies like media integration, development of conglomerates and standardization of programmes. Hence, LFRs should not expect many benefits from these policies, as they do not have the industrial capability to compete on a global scale.

At the EC level, attention is still very much concentrated on the electronics hardware industry (medium) rather than on the content (message). This approach might start to change once the economic interdependence between the medium and the message becomes clearer. The message is particularly important in its production dimension because it is essential to the development of cable, satellite and HDTV.

Nevertheless, the EC is still not particularly concerned with software. At this stage, there is still a belief that it is the hardware industry which will pull Europe out of recession and improve its competitiveness globally.

This perspective is far from being the most convenient for Portugal because it does not have the industrial basis to compete. In addition, the EC broadcasting policies concerning cross border distribution are not a big incentive for Portuguese home production.

Anyhow, the impact of the EC policies has been much stronger in telecommmunications than in broadcasting. With the support of the EC regional policy, the Portuguese government has been modernising the basic telecoms infraestructure. In terms of broadcasting, the impact of EC is not very clear yet, but it is difficult to figure out in which ways Portugal could benefit from the EC policies.

In fact, while the telecoms sector in Portugal seems to be making considerable progresses, the same cannot be said in relation to broadcasting. The reasons for this situation is not only related to the EC but also, and mainly, with politics at a national level.

Although it is not yet clear if the Portuguese government will achieve its objectives for the telecommunications sector, it could be considered that its main goals are to:

- develop the basic infraestructure
- encourage the introduction of value added-services
- introduce flexible private management (in opposition to bureaucratic and centralized public management)
- separate operators from regulators
- protect national interests against foreign investments
- protect the interests of the state against private capital
- take advantage from EC programmes to foster development

It is evident that whereas the Portuguese authorities has some concrete ideas towards the development of the telecommunication sector, the broadcasting sector is without any clear direction.

It can be said that the main reason for this difference is that telecommunications is related to economic growth while broadcasting is mainly related with cultural aspects

and political control. In order to maintain its political control over broadcasting products, the government cannot put foward a clear set of objectives for the sector. Unlike in the telecommunications sector, the real goals of the government for broadcasting would not be politically acceptable.

7 Bibliography

Cleevely, David & Ade Ajibulu, 'Strategic Issues in the Development of Advanced Services in Portugal' report prepared for the Seminar 'Critical Threshold for the Introduction of Advanced Communications Services', Lisbon, November, 1992.

Collins, R. et al., The Economics of Television. The UK Case, Sage, London, 1987.

Commission of the European Communities, Television Without Frontiers, Green Paper, 1984.

Daniels, Guy, 'Portugal: Opening the Market' in Telecommunications (International edition), November, 1991.

Drijvers, Jan, 'Community broadcasting: a manifesto for the media policy of small countries' in Media, Culture and Society, Vol.14, Number 2, April 1992.

Ferreira, Joel H., 'Portugal' in European Media Institute (ed), The Media on Western Europe, Manchester, 1992.

Gonçalves, M. Augusta, 'O Caso Particular da Televisão Portuguesa' (The peculiar case of the Portuguese Television), Público, 24th Nov. 1992.

Ham, C. & M. Hill, The Policy Process in the Modern Capitalist State, Harvester Wheatsheaf, 1984.

Hills, Jill, Information Technology and Industrial Policy, Croom Helm, London, 1984.

Hills, Jill & Papathassopoulos, The Democracy Gap, London, Greenwood, 1991.

Hodges, Michael, 'Integration Theory' in Trevor Taylor (ed.) Approaches & Theory in International Relations, N.Y., Longman, 1978.

Locksley, G., 'Europe and the Electronics Industry: Conflicting Strategies in Positive Restructuring' in D. Marsh, Capital and Politics in W. Europe, Frank Cass, London.

Locksley, G., TV Broadcasting in Europe and the New Technologies, CEC, Brussels, 1988.

Kelly, Tim & Yoichi Iida, 'The OECD Communications Outlook 1993: Focus on Portugal', paper prepared for the Seminar 'Critical threshold for the introduction of advanced communications services', Lisbon, November, 1992.

Lodge, J. 'European Political Cooperation: Towards the 1990's' in J. Lodge, The European Community and the Challange of the Future, Printer Publishers, London, 1989.

Mackintosh, I., Sunrise Europe: The Dynamics of Information Technology, Basil Publishers, London, 1986.

McQuail, Denis, New Media Politics, The Euromedia Research Group, Sage, London, 1986.

Nugent, Neil, The Government and Politics of the European Community, Macmillan, London, 1991.

Owen, Donald & J. Ferreira, 'Portuguese telecommunications and information tecnologies, Development and prospects' in Telecommunications Policy, Vol.14, Number 4, 1990.

Portuguese Association for the Development of Communications (APDC), Comunicações, Special Issue, February 1993.

Sandholtz, Wayne, 'Institutions and Collective Action, The New Telecommunications in Western Europe, World Politics, Vol.45, N. 2, January 1993.

Sharp, M., The Community and New Technologies' in J. Lodge, The European Community and the Challange of the Future, Printer Publishers, London, 1989.

Taylor, P., 'The New Dynamics of the EC integration in the 1980's' in J. Lodge, The European Community and the Challange of the Future, Printer Publishers, London, 1989.

Taylor, P. 'Consociationalism and federalism as approaches to international integration' in Paul Taylor ed. Frameworks for International Co-operation, London, Pinter Publishers, 1990.

Ungerer, Herbert, Telecommunications in Europe, Official Publications, Luxemberg, 1990.

Ungerer, Herbert, 'European policies and regulation' in Telecommunications Policy, Vol.16, Number 9, December 1992.

Wallace, William (ed.), The Dynamics of European Integration, The Royal Institute of International Affairs, Pinter Publishers, London, 1990.