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## Media Systems and Stateless Nations: Catalan and Welsh Radio in Comparative Perspective

### Sistemes mediàtics i nacions sense estat: una perspectiva comparada de la ràdio catalana i gal·lesa

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*This paper offers a first exploratory approach to the comparative study of radio systems in Catalonia and Wales. Within the framework of comparative media systems studies, this paper uses the concept of subsidiarity as its central axis for analysing two cases. It represents one of the first comparative analyses of the structure of radio systems as well as a first approach to the reality of media systems in stateless nations, areas usually ignored in literature about this subject. In doing so, it compares five core dimensions of any radio system using a variety of secondary and comparable sources: ownership, programming, language, funding and regulation. The results illustrate the asymmetry of the two radio systems, which have different degrees of development. Regulation and language emerge as cornerstones for designing media systems in stateless nations. At the same time, the level of subsidiarity of these systems to state me-*

*L'article ofereix una primera aproximació exploratòria a l'estudi comparat dels sistemes radiofònics de Catalunya i Gal·les en el marc de les teories sobre els estudis comparats de sistemes mediàtics i utilitzant com a fil conductor el concepte de subsidiarietat. La seva originalitat és doble: presenta una de les primeres comparacions sobre l'estructura dels sistemes radiofònics alhora que també ofereix una primera aproximació a la realitat dels sistemes mediàtics de les nacions sense estat, àmbits fins ara oblidats en la literatura sobre la matèria. Per fer-ho compara cinc dimensions estructurants del sistema radiofònic a partir de diverses fonts secundàries i comparables: la propietat dels emissors, l'oferta programàtica, l'idioma, el finançament i el poder regulador. Els resultats mostren l'asimetria d'ambdós sistemes radiofònics, en diferent grau de desenvolupament. Es posa de manifest la centralitat de la regulació per dissenyar els sistemes mediàtics de les nacions sense estat, així com el rol*

*dia systems also plays a central role in structuring these systems.*

**Key words:** *Media systems, radio, stateless nations, Catalonia, Wales.*

*central i estructurador de la llengua. Alhora, es mostra la influència del nivell de subsidiarietat respecte del sistema mediàtic estatal en el qual s'insereixen.*

**Paraules clau:** *sistemes mediàtics, ràdio, nacions sense estat, Catalunya, Gal·les.*

The comparative research of media systems is still limited, although it was certainly boosted by the publication of the reference work by Daniel C. Hallin and Paolo Mancini (2004). Media systems are usually compared through analysis of their organisation and functions in two or more countries. Some of the most recent research has also shown the need to transcend the traditional national approach to media systems in order to gain a better understanding of their nature in certain regions where cross-national media are central actors (Kraidy, 2012). However, research of such a nature is still ignoring the national realities within the states, some of which have their own media systems, those labelled “culturally pluralistic societies” or the “fourth world” in one of the first comparative studies of broadcasting (Howell Jr., 1986). That is the premise that justifies this article: the study of media systems in stateless nations must be included in the field of compared studies of media systems.

Additional problems are involved in the study of stateless nations due to the use of states as the common source of analysis (Livingstone, 2003). There are two reasons for this: (a) statistical systems tend to use this form of organisation as their reference unit; (b) the centralised configuration of media systems. At the same time, the evolution of contemporary society also compels researchers to look beyond this horizon:

While the process of globalization appears to encourage cross-national research, at the same time it undermines the legitimacy of the nation-state not only for political, economic or cultural purposes but also as a unit of analysis (Livingstone, 2003: 480).

Moreover, Hallin and Mancini’s study was focused on the press and journalism, with less emphasis on broadcasting, which is precisely the type of cultural industry where public policy has the greatest impact. Broadcasting is the area where there has been the most intense public intervention in terms of legislation (through laws and standards configuring the industry) and regulation (directly or through audiovisual councils or other regulatory authorities), as well as being an actor through public broadcasting services.

For these reasons, the main objective of this article is to analyse radio, one of the fields of broadcasting, through a comparative analysis of the cases of Catalonia and Wales, two examples of nations that form part of multi-nation states. The two derived objectives are therefore: on the one hand, to perform a comparative analysis of radio systems, and on the other, to also offer a comparative analysis of two sub-state realities. In both cases, these are areas that have received little academic attention in the field of communication.

A few basic characteristics should be given that, to a major extent, determine the weight of the radio sector. In 2012, Catalonia was a 32,108 km<sup>2</sup> autonomous community of Spain with a population of 7,546,522 and a population density of 235.8 people per km<sup>2</sup>. People are basically concentrated around Barcelona and its metropolitan area, which represents 63% of its total population but just 7.6% of the surface area, and that has a population density that is 800% greater than the overall figure<sup>1</sup> (IDESCAT, 2013). According to the 2011 annual report on linguistic policy, 80.5% of the adult population is able to speak Catalan and 96.3% is able to understand it (Generalitat de Catalunya, 2012).

In Spanish radio, the public and private sectors have coexisted since the end of the Civil War (1936-39) and have always, in some way or other and with some exceptions, used advertising as a source of total or partial funding. One of its most interesting traits is that Franco did not derogate any previous law or make the private sector disappear; he was focused on applying censorship and awarding frequencies as a political tool, along with the obligation for all stations to connect to the newscasts produced by the public broadcaster Radio Nacional de España (RNE). This decapitalised and oligopolistic radio sector was not competitive, and its business structure was unsound and highly concentrated. It would be these highly controlled broadcasters, which were more focused on political than commercial benefits, that would face the deregulation of the Europe of the 1980s at the same time that democracy was arriving in Spain. One of the consequences of that process is that the current structure of the Spanish radio sector is a reflection of the political and administrative structure that was instated in the wake of democracy, and that is why there is radio on a state, autonomous (regional) and local level, both in the public and private sectors (Bonet, 1995, 2012; Bonet & Arboledas, 2011). One of the most outstanding features of this system is that, despite being notably enriched by the media panorama, unlike in such cases as Germany, the different structures have not collaborated with each other or have only done so occasionally.

Meanwhile, Wales is one of the nations that make up the United Kingdom. Located in the southwest of the island of Great Britain, it has a population of 3.1 million, living on a surface area of 20,780 km<sup>2</sup> and with a density of 148 people per km<sup>2</sup>. The population is mainly concentrated in South Wales, especially in the cities and surrounding areas of Cardiff (the capital, with 346,100 inhabitants), Swansea (239,000) and Newport (145,700)<sup>2</sup> (Welsh Government, 2013a). The regions of North Wales and Mid & West Wales are less populated. This is the result of the historical evolution of Wales, and especially the developments in the south during the Industrial Revolution, but also of its complex geography, which is mainly mountainous, especially in the centre and north of the country.

These characteristics have conditioned the radio market, especially in terms of coverage and the distribution of stations. In addition, Wales is officially a bilingual country, but only 19% of the population speaks Welsh<sup>3</sup> (Welsh Government, 2013b). The Welsh governments' lack of competences in terms of broadcasting, a small-scale media sector, mainly external ownership of media companies and the short history of the autonomous institutions are other key factors for understanding the situation of the sector (Talfan Davies & Morris, 2008).

## METHOD

This article approaches its object of study through a comparative case study of a holistic nature (Yin, 2009). It does this by analysing five different dimensions that to a large extent make up the structure of the radio sector. Of these dimensions, two are general and three are more specific in nature. The general ones refer to classic aspects of the act of communication: the sender and the message. In this regard, *ownership of the media* (and subsidiarity with respect to the state media system) and the *programmes offered*, are studied along with *language*, a central element of stateless nations with a different language to that of the state to which they belong and that is analysed here in relation with the audience, *funding*, which tells us about the size of the market and the role of public funding, and *regulation*, as the design and execution of the sector determines to a large extent its structure.

In the case of the media systems of stateless nations, a recurrent element of these five dimensions is the idea of subsidiarity. This concept is of major normative value in the field of political science and law (Craig, 2012) but has barely been used in the field of communication other than references when describing European communication policies. In fact, its normative value in communication is highly limited within states, such that its analytical use is derived from its explanatory value for observable phenomena.

The concept of subsidiarity has the positive connotation of attempting to regulate and assign resources depending on the administrative level where this task is most efficient. However, conflicts of competences arise that are often emphasised by this subsidiarity (Giuranno, 2010). In this research, this concept is not given either a positive or a negative value, but rather is used as a theoretical concept that helps to understand the organisation and dynamics of the radio systems of stateless nations like Catalonia and Wales. So, this concept is used here as an indicator of the dependent relations between the state and sub-state levels of media systems.

The design of this study was based on the selection of two relevant cases; Cormack (2007) cites Catalonia and Wales as two classic examples where minority languages have made successful use of their media. Other than this reference, three elements justify the choice of Catalonia and Wales as territories for comparison:

- a) Both are stateless nations that in recent decades have undergone a process by which competences have been devolved to them. In the Catalan case, the arrival of democracy in Spain and the passing of the constitution in 1978 created a quasi-federal system of autonomous communities; in the

Welsh case, since the passing of the referendum in 1997 and the creation of the National Assembly for Wales.

- b) Both have two official languages, Catalan and Spanish in Catalonia, and Welsh and English in Wales. In both cases, the former has traditionally been considered a minority language for historical and political reasons and the latter is one of the most widely-spoken languages in the world.
- c) Both communities have a very strong sense of their identity.

In the past, certain studies have offered an overview of radio in different countries without establishing comparisons (O'Neill *et al.*, 2010; Hendricks, 2012) while others have started to explore the subject from a historical perspective (Arboledas & Bonet, 2013). No study has done so in terms of the situation in stateless nations.

Given the exploratory nature of this study, the first research question proposed is formulated generically: (Q1) what are the main structural differences between the Catalan and Welsh radio systems in terms of subsidiarity?

A second question arises from the first: (Q2) what is the weight of the different dimensions of analysis in the configuration of these media systems?

To answer these questions, secondary data from different sources were used. Apart from the problem of the state-based nature of the available statistics as already noted by Livingstone (2003), we can add the need to find comparable data for two very different national situations. The ultimate objective of the article is to offer a preliminary approach to the comparative study of the radio systems of Catalonia and Wales and to make a specific theoretical contribution to the literature on comparative media systems, but in relation to stateless nations.

## RESULTS

The results offered hereinafter are presented transversally for Catalonia and Wales on the basis of the five studied dimensions.

### OWNERSHIP

#### *Catalonia*

Among the private sector frequencies, we first find those that form part of a state-based broadcasting company (table 1). These are therefore the regional network in Catalonia of companies whose business headquarters are in Madrid. Second, there are broadcasters that form part of networks. These are more or less numerous in terms of frequencies and extension across the solely-Catalan territory or, at best, with some frequencies in Catalan speaking areas outside of Catalonia, such as the Balearic Islands and Andorra. But their business and production headquarters are in Catalonia. Finally, there is a smaller but increasing number of local broadcasters with a single frequency or little more than that which might, in some cases, collaborate with each other and have occasional programming agreements.

**Table 1. Basic structure of the radio sector in Catalonia**

COVERAGE	OWNERSHIP	
	PUBLIC	PRIVATE
State	<p>Grupo RNE (Radio Nacional, Radio Clásica, Radio 3, Radio 5 Todo Noticias and Ràdio 4 (only in Catalonia and in Catalan))</p> <p><b>9 AM and 72 FM frequencies only in Catalonia</b></p>	<p>PRISA Radio: Cadena SER, 40 Principales, Màxima, m80 Radio, Radiolé, Cadena Dial</p> <p>COPE, Cadena 100*</p> <p>Onda Cero Radio (OCR): OCR, Europa FM, Onda Melodía</p> <p>Kiss FM</p> <p>Radio Marca</p> <p><b>12 AM and 83 FM frequencies in Catalonia</b></p>
Autonomous community	<p>Catalunya Ràdio channels (Catalunya Ràdio, Catalunya Música, Catalunya Informació)</p> <p><b>184 frequencies</b></p> <p>Only available on Internet: CatClàssica, iCat.cat, iCatJazz, iCatrònica, totcat, iCatRumba, iCatMón</p>	<p>Grup Godó: RAC1, RAC105</p> <p>Grupo TeleTaxi: RM Radio, Radio Tele-Taxi</p> <p>Ràdio Estel</p> <p>Grup Flaix: Flaix FM, Flaixbac</p> <p><b>75 FM frequencies</b></p>
Local	<p><b>270 FM frequencies</b></p>	<p>Ràdio Marina, Ràdio Olot, Ràdio Ripoll, Ràdio Valls, Ràdio Vic, GUM FM, el 9fm, etc.</p> <p><b>20 FM frequencies</b></p>
TOTAL FREQUENCIES	<b>526 FM / 9 AM</b>	<b>178 FM** / 12 AM</b>

Source: the authors on the basis of information available on the broadcasters' websites and that of the Spanish Ministry of Industry, Tourism and Commerce.

\* There are groups like COPE that offer other programmes but that cannot be listened to Catalonia.

\*\* The FM figures may vary a little within the private sector because in some cases the frequency belongs to one Catalan company but is leased for the broadcast of programmes from a state radio channel.

This definition for the private sector can be transferred to the public one, although local radios have much weaker signals than public regional and state-wide radios. Moreover, every local council in Spain has the right to have a radio station.

This structure of the business offer can present a fairly complex panorama in terms of programming. Some stations are always on air with network programmes, i.e. programmes are produced and broadcast from a single station and for all the others. However, in some cases, they might disconnect in order for stations to offer programmes for their more immediate audience. Moreover, there are some cases, for example networks such as SER, COPE and Onda Cero Radio, that have always offered state programmes, produced for the whole of Spain, along with others produced only for channels in an autonomous community, such as Catalonia (SER Catalunya, for example) and produced by each local station making up the network

(for example, programmes solely for the Barcelona station). However, both the crisis and the tendency to concentrate (fostered by the application of scale economies) have led to the withdrawal of the most locally focused programmes from schedules.

Finally, there is community radio. Although these stations are mentioned in many norms, they have never been regulated at all. Their number is variable and unknown given that many of them are so locally focused.

There are also digital audio broadcasting (DAB) stations in Barcelona simulcasting FM signals from state-wide broadcasters but the amount of receivers available is negligible. At the moment, there is talk in Spain of the failure or stand-by of digital radio, and there is a major lack of receivers or specific programmes (Bonet *et al.*, 2009). In this article, we shall mainly be focusing on radio in the most traditional sense, using the Hertzian system, which is the most consolidated type and the one with the longest history, even though new platforms are clearly serving as the basis for their expansion (Fernández-Quijada & Bonet, 2008; Bonet, Fernández-Quijada & Ribes, 2011; Sellas, 2012).

### Wales

The radio sector in Wales has the three classic models that also exist in Catalonia: public service radio, commercial radio and community radio. However, the available offer and territorial distribution are conditioned by geographic factors and the way the sector has been configured over the years.

The possibilities for listening to the radio differ around the country, with a much greater concentration of options available in the south, both for DAB and analogue. In the case of DAB, Welsh citizens can access four local/regional multiplexes, one private and nationwide multiplex (Digital One) and one public multiplex for the whole of the United Kingdom (BBC National DAB). This offer is distributed in just four areas of coverage, three of which are in the south (table 2).

**Table 2. DAB Multiplexes in Wales \***

AREA	COVERAGE <sup>4</sup>	MULTIPLEX
Severn Estuary	2,400,000	BBC National DAB (11 channels) Digital One (14) MXR Ltd. (10)
Cardiff/Newport	840,000	BBC National DAB (11) Digital One (14) Now Digital (6)
Swansea	540,000	BBC National DAB (11) Digital One (14) UTV-Emap Digital (6)
Wrexham, Chester and Liverpool	1,800,000	BBC National DAB (11) Digital One (14) MuxCo (6)

Source: the authors on the basis of the information available on the broadcasters' websites and that of Ofcom (2012).

\* This offer will be changing in the coming months: the MuxCo North Wales and MuxCo Mid & West Wales multiplexes will be set up, while the managers of the MXR multiplex in the Severn Estuary (Global Media, Real & Smooth Ltd. And Arqiva) have announced that they won't be renewing their licence at the year of the year due to its lack of profitability.

In Wales, digital terrestrial radio responds to the centralist British model in which the priority has, since the outset, been to guarantee the reception of the common private and public channels offered throughout the United Kingdom. So, the BBC National DAB multiplex covers 85% of the territory and gives Wales access to all of the services in the BBC Network (Radio 1, 2, 3, 4, 5Live, 6 Music, BBC Asian Network, 1Xtra, 4Extra, 5Live Sports Extra and BBC World Service), while the Digital One multiplex offers the main private nationwide channels (Absolute Radio, Absolute 80s, Absolute 90s, BFBS Radio, Classic FM, Jazz FM, Kiss, Planet Rock, Premier Christian, Smooth Radio, Smooth 70s, Talk Sport, Team Rock, UCB).

The BBC has two territorial networks in Wales: BBC Radio Wales (broadcast in English) and BBC Radio Cymru (in Welsh). They do not have their own DAB multiplex and instead shares local multiplexes designed for private radio (used by such commercial groups as Global Radio, Absolute and Town & Country Broadcasting, among others). So, in this case, public radio depends on licenses subject to economic rather than public service criteria (Talfan Davies & Morris, 2008).

As for analogue radio, the full range of state-wide networks, both public (BBC Radio 1, 2, 3, 4 and 5Live) and private (Absolute Radio, Classic FM and Talk Sport), are available. Along with these are the public corporation's regional channels: BBC Radio Wales, with 97 FM and 3 AM frequencies, and BBC Radio Cymru, with 10 FM frequencies. In the private sector, there are 15 commercial stations, most of which are concentrated in South Wales, although the regulator Ofcom's licensing policy has encouraged new stations around the whole territory (table 3).

**Table 3. Private commercial stations (analogue) in Wales**

STATION	AREA
Bridge FM (1 FM frequency)	Bridgend County Borough (South Wales)
Capital South Wales (2 FM)	Cardiff and Newport (South Wales)
Radio Carmarthenshire (2 FM)	Carmarthenshire County (South Wales)
Radio Ceredigion (3 FM)	Ceredigion (West Wales)
Gold Wales (3 AM)	South Wales / North Wales and Cheshire
Radio Hafren (1 AM)	Newtown, Powys County (Mid Wales)
Heart Cymru (1 FM)	Gwynedd & Anglesey (North-West Wales)
Heart North West and Wales (3 FM)	North Wales Coast, Wrexham and Chester
Nation Radio (2 FM)	South Wales
Nation Hits (1 FM)	Swansea (South Wales)
Radio Pembrokeshire (2 FM)	Pembrokeshire (South Wales)
Real Radio Wales (20 FM)	Nationwide
Scarlet FM (1 FM)	Carmarthenshire County (South Wales)
Swansea Sound (1AM)	Swansea (South Wales)
The Wave (1 FM)	Swansea (South Wales)

Source: the authors based on Ofcom (2012), Rajar (2013) and MediaUK (2013).

In recent years, the private commercial radio sector has undergone a concentration process as the result of more flexible regulation policy in relation to such key aspects as ownership and broadcasting. Due to this process, groups' owners

and interests are often far from those of the local communities (Barlow, 2006; Crisell & Starkey, 2006, Starkey, 2011). The offer of radio is completed by a dozen community stations. These are non-profit making projects that respond to three factors: major ties with the local community, service for zones overlooked by the private commercial sector and a desire to serve the population (Barlow, Mitchell & O'Malley, 2005; Talfan Davies & Morris, 2008).

**PROGRAMMES OFFERED**

*Catalonia*

At first sight, there is a dominance of specialised programmes over news/talk (table 4). But although that is the case with state and regional stations, the situation is different if we limit our focus to local stations, especially public ones. The specialised offer relies heavily on music, most of it based on hot clock formats, with the exception of Radio Marca and the all-news format stations that only exist in the public sector: Radio 5 Todo Noticias and Catalunya Informació. There is only one private regional station offering a news/talk schedule, namely RAC1.

**Table 4. Programmes offered by the radio sector in Catalonia**

PUBLIC		PRIVATE	
National	Regional	National	Regional
<b>News/Talk</b>			
RNE, Ràdio 4 (RNE)	Catalunya Ràdio	Cadena SER, Onda Cero Radio, Cadena COPE	RAC1
<b>Specialised - Music</b>			
Radio Clásica, Radio 3	Catalunya Música	40 Principales, Cadena Dial, Máxima FM, m80 Radio, Radiolé, Cadena 100, Europa FM, Onda Melodía, Kiss FM	RAC105, Flaix FM, Ràdio Flaixbac, Ràdio Estel, RM Radio, Radio Tele-Taxi
<b>Specialised – All News</b>			
Radio 5 Todo Noticias (TN)	Catalunya Informació		
<b>Specialised Sports</b>			
		Radio Marca	

Source: the authors.

The local public radio stations are news/talk, as they are prevented from exclusively providing music-based schedules. In some cases, they can include some music programmes in their schedules, but this cannot be their main type of content.

*Wales*

The sector is characterised by the prominent role of the BBC, which has historically had very little autonomy with regard to the decisions made at the corporation’s headquarters in London (Williams, 2000) and has had difficulties making its consideration as ‘local’ compatible with Wales’ status as a ‘national

region'.<sup>5</sup> BBC Cymru Wales was created in 1964, but its first broadcasts of its own content did not arrive until the late 1970s. It offers dual content: BBC Radio Wales, with 20 daily hours of news/talk in English (at night it connects to the BBC World Service), and BBC Radio Cymru, with 19 hours of general interest and musical content in the Welsh language (from midnight, it broadcasts the BBC Radio 5 Live signal).

In the late 1990s, BBC Radio Cymru restructured its offer, and shifted from the fragmented model that was so typical of its origins (derived from BBC Radio 4) to another based on large time slots, with presenters playing a prominent role, as well as music programmes and disc jockeys. Among other objectives, the idea was to attract a younger audience, especially among the population that had learned Welsh at school. For Ellis (2000), this remodelling was closer to the characteristics of private radio and more distant from its public service remit. At the same time, BBC Radio Wales made some changes to its schedules to break away from the predominant image of catering for the interests of the valleys in South Wales, the area where the bulk of its audience is based. However, neither station managed to become consolidated as the main references for the audience (Ellis, 2000).

The consolidation of BBC Cymru Wales also suffered competition from local private radio, promoted by the Sound Broadcasting Act. Passed in 1972, this law responded to the British government's desire to break the BBC's monopoly and generate a more competitive radio market around the United Kingdom. For Wales, this represented the opportunity for specific treatment of its own affairs, more plurality of voices and an increase in Welsh language content (Barlow, Mitchell & O'Malley, 2005).

Given the absence of local public service on the BBC, private stations have legal obligations to provide news programmes as a value of proximity and the regulator also considers local audiences and their needs. But financial difficulties have led to a reduction in these demands (Barlow, 2006). The result is a sector in which there is a predominance of economic criteria over those of public interest, a hazy relation with the community and a minority presence of the Welsh language (Barlow, 2005). The available content, which should fit with the description of 'music and news', is mainly musical, with very little and not particularly significant news, and much homogeneity between the different stations (Thomas, 1998). In some cases, they offer mixed schedules that combine music programmes with other content and news (table 5).

**Table 5. Programmes offered by the radio sector (DAB and analogue) in Wales**

PUBLIC		PRIVATE	
National	Regional	National	Regional
<b>News/Talk</b>			
BBC Radio 4, BBC Radio 5 Live, BBC Asian Network, BBC Radio 4 Extra, BBC World Service	BBC Radio Wales, BBC Radio Cymru	BFBS Radio, Premier Christian, UCB UK	LBC, UCB Inspirational
<b>Specialised – Music</b>			
BBC Radio 1, BBC Radio 2, BBC Radio 3, BBC Radio 6 Music, BBC 1Xtra		Absolute Radio, Absolute 80s, Absolute 90s, Classic FM, Jazz FM, Kiss, Planet Rock, Smooth Radio, Smooth 70s, Team Rock	Capital South Wales, Gold Wales, Choice FM, Real Radio, Nation Radio, Juice FM, Dee, Heat Radio, Magic, Galaxy, Heart, Kiss, UCB Gospel, Swansea Sound, Radio Carmarthenshire, Radio Hafren, Heart North West and Wales,
<b>Specialised - Sports</b>			
BBC Radio 5 Live Sports Extra		Talk Sport	
<b>Mixed-format stations</b>			
			The Wave, Bridge FM, Radio Ceredigion, Heart Cymru, Radio Pembrokeshire, Scarlet FM

Source: The authors based on Rajar (2013), MediaUK (2013) and observations of the broadcasters’ websites.

## LANGUAGE

### *Catalonia*

In terms of the public sector, all the public regional stations (Catalunya Ràdio, Catalunya Informació, Catalunya Música and Catalunya Cultura) broadcast in the Catalan language, as do RNE’s Ràdio 4 and many municipal stations (they often use both languages). As for the private sector, RAC 1, RAC 105, Flaix FM, Flaixbac, Ràdio Estel and local stations offer all of their programmes in Catalan.

Privately owned radio stations are obliged by the Linguistic Policy Law of 1998 to include a minimum of 50% of their time in Catalan, to guarantee a sufficient presence of “songs produced by Catalan artists” and for a minimum of 25% “to be songs sung in the Catalan or Aranese languages”. The regulation did state that the characteristics of the audiences of certain media could be taken into account, in clear reference to the kind of music broadcast on such networks as Radiolé, Cadena Dial, Radio Tele-Taxi and RM Radio, whose formats are based on Spanish music sung in Spanish (and maybe the occasional song in Catalan, Galician or Portuguese, but these are never dominant).

Later, a resolution passed in 1999 established which time brackets would be affected. Broadcasts during peak audience times (7.00 to 12.00 and 18.00 to 20.00, every day) counted double. The daily peak audience periods were considered to be as follows: from 7.00 to 12.00 and from 18.00 to 20.00, every day of the week.

The Catalan Audiovisual Law of 2005 stipulated that the *Consell de l'Audiovisual de Catalunya* (Catalan Audiovisual Council, CAC), the regulatory body in the Catalan region, would establish the criteria for the exceptional nature of certain audiences. In the public sphere, the obligation is always firmer, although the audience to which a local channel is addressed may be taken into account. In the area of private stations, what was stated in earlier laws (50% and 25%) was confirmed, but exceptions were introduced: if a station broadcasts classical music (although there is no private channel that does), if the channel offers 75% of musical content (and can justify that the kind of music it broadcasts does not directly relate to productions sung in Catalan), or if the channel forms part of a state-wide network, there are some exceptions that, in short, are allowed reductions from 50% to 35% and from 25% to 12%, more or less. To a large extent, the changes came about as a result of pressure from within the sector itself.

According to a study by Baròmetre, radio has a daily reach of 57.8%; the usual language of people that listen to the radio from Monday to Sunday in Catalonia is Catalan for 48.1%, Spanish for 48.9% and 3% use other languages. As for the language for radio consumption, 57.9% of the total number of radio listeners in Catalonia listen to radio broadcast in Catalan, and 59.9% to radio in Spanish.<sup>6</sup> As for news/talk programmes, the two most popular networks in terms of audience are both regional and totally in Catalan, one of which is public (Catalunya Ràdio) and the other private (RAC1) and for several years these two stations have been contesting the leadership. These are followed by private and public state networks (SER, Onda Cero, RNE, COPE, etc). Music radio stations based on hot clocks are led by 40 Principales followed by two regional Catalan channels (Flaix FM and RAC105), while for all-news radio, the also regional Catalunya Informació is far and away the leader. As for specialised music stations without a hot clock based format, Radio 3 is the leader, followed by Catalunya Música, and then Radio Clásica (FUNDACC, 2013).

## Wales

The language issue has been a constant feature of the public debate on the Welsh media system. According to Andrews (2006), this is why Wales exceptionally has two publicly funded networks: BBC Cymru Wales (which includes the Welsh language channel BBC Radio Cymru) and Sianel Pedwar Cymru (S4C, the public Welsh language TV service). But in the case of radio, problems receiving the signal have affected the diffusion of Welsh language content: 70% of Welsh language speakers cannot listen to BBC Radio Cymru in DAB (Audience Council for Wales, 2012).

BBC Radio Cymru is the only station that broadcasts in Welsh for the whole of the country and it plays a key role in promoting the language. Aside from this, only a few local private channels and some community stations broadcast programmes in Welsh, but in most cases only as a small portion of their overall content (Dyfrig & Jones, 2006). Language has been the cause of much controversy between organisations defending Welsh culture and identity and the regulator, Ofcom.

Despite a weekly reach of 93.2%<sup>7</sup> and the fact that public radio is more popular in Wales than anywhere else in the United Kingdom, the regulator has no legal capacity

to impose specific linguistic requirements on broadcasters. BBC channels amount to 61% of the time that Welsh people spend listening to the radio, the highest percentage in the United Kingdom (for which the average is 55%). However, most of this percentage (49%) corresponds to those listening to the BBC Network, i.e. the BBC's state-wide content. The regional BBC Radio Wales and BBC Radio Cymru only get 12% of the total time that Welsh people spend listening to the radio (Ofcom, 2012).

## FUNDING

### *Catalonia*

Radio in Spain has accepted advertising since it started. All radio stations apart from the state public service, which withdrew it in 1993, include commercials. In the case of the private sector, it is what they live from and in the case of the public sector, it is additional income to that received from the corresponding administration.

The Catalan advertising market decreased more in 2011 than it did for the state as a whole (10.5 and 5.4% respectively), to 50.4 million euros, which has led to a reduction in employment in the sector of between 28% and 30% since the start of the crisis (ACR, 2012).

In early 2012, the Catalan government passed a law that established the conditions to gradually reduce the amount of advertising on the Catalunya Ràdio stations to eventually get rid of it completely, although no specific dates were mentioned.

### *Wales*

As in the rest of the United Kingdom, radio funding in Wales is different for public and commercial radio. In the case of the BBC, the budget mainly comes from the license fee that Britons pay to finance the public corporation. The BBC spent a total of 33.6 million pounds on BBC Radio Wales and BBC Radio Cymru in the 2011/2012 season (Ofcom, 2012). Expenditure per capita was 11.17 pounds, the second highest figure in the country. This can be explained by how Wales has a lower population than the rest and the added costs of maintaining a dual structure. The BBC's expenditure on the two Welsh networks has increased in recent years (33.1 million pounds in the 2010/2011 season and 32.3 million in 2009/2010). However, the tendency will change in future years, due to cuts in the British public corporation's expenditure until 2016, which in the case of BBC Cymru Wales will be 16% (BBC, 2012).

As for private radio, its main problem has always been of a commercial nature (Williams, 2000). The high social penetration of radio in Wales and the amount of time people spend listening to it, which is higher than in the other nations of the United Kingdom and the average for the country, is not resulting in financial results for the sector. Commercial radio generated income of 16.9 million pounds in 2011, half a million more than the previous year. But the figure had previously reached 17.5 million pounds in 2008. If considering the total population, income per capita amounts to 5.59 pounds, the lowest level in comparison with the other nations of the United Kingdom (Ofcom, 2012).

## REGULATION

### *Catalonia*

In terms of broadcasting, the Spanish system works as follows. The public sector directly obtains the radio and television frequencies that it needs for different areas. But the private sector has to place bids in a tender in which the first stage involves the relevant Spanish ministry planning the necessary amount of frequencies and publishing the technical characteristics, base population where it is awarded, etc. After that, each autonomous community prepares and announces its bid and, once presented, broadcasters apply for the frequencies they want and after paying a deposit, the tender begins. The decision is made by the regional government, except in the case of Catalonia, the only region where it is not the government but a regulator that awards licenses.

However, where neither the regional government nor the regulatory council have any kind of control is regarding radio waves, as the Spanish state, via its government, holds sole authority in this area.

### *Wales*

The structure of the sector is conditioned by the lack of competences that Wales has with regard to broadcasting. The National Assembly can legislate on about twenty matters, as part of the devolution process that began after the 1997 referendum. In 2011, another consultation gave the green light for an increase in autonomy, which would enable the Assembly to legislate in certain areas without needing to negotiate with the British Parliament. But London has always refused to transfer broadcasting competences, the argument being that this is a state issue and that the centralist model simplifies the regulation of radio waves. Communication policies depend on the British Government's Department for Culture, Media and Sports (DCMS) and the National Assembly for Wales and the Welsh government can only voice its opinions.

The political and legislative decisions that affect the broadcasting sector in Wales are made outside of its borders, despite certain structures that supposedly enable Welsh concerns to be voiced. Such is the case of the Audience Council Wales, which acts as a link between the BBC's governors and Welsh interests, but whose role is only advisory. As for Ofcom, the regulator has an office in Cardiff (what it calls its National Offices) to attend to territorial affairs and interests. Interlocution is also possible through an advisory committee for Wales that meets five times a year and passes its reports to the body's top management. However, the Communications Act of 2003 left Wales without any representation on the Board of the regulatory body, its main decision making body, and the Westminster Parliament tends to deal with Welsh media affairs in terms of specific concerns, and not globally (Andrews, 2006).

Over the years, this lack of competences has conditioned the role of the radio sector in terms of Wales' heterogeneous and permeable culture and identity (MacKay & Powell, 1996; Williams, 2000). In what is still an open process of recovery of self-government and in the perspective of the legislative reforms in the United Kingdom in the area of communications, devolution of competences regarding

audiovisual matters is still on the agenda of pending issues (Andrews, 2006; Barlow, 2006; IWA Media Policy Group, 2011).

## DISCUSSION AND CONCLUSIONS

The main question asked by this article focuses on the structural differences between the Catalan and Welsh broadcasting systems. Based on this analysis of the five proposed dimensions, it is consistently and systematically observed how relevant the concept of subsidiarity is in the study of these media systems, although to differing extents.

Methodologically, the different analysed dimensions carry very different weight. It thus seems evident that the highest impact corresponds to regulation, as it affects other areas, such as the offer available, ownership and the language used in the content that is broadcast. This latter factor also emerges as highly relevant in cases in which, like Catalonia and Wales, a language innate to the territory exists alongside another used throughout the state. More than a symbolic value, language also acts as a determinant factor in the market for commercial actors, conditioning the offer of private radio in the Catalan case, or reserving it for public service radio in the case of Wales.

As for ownership, the degree of subsidiarity in Wales is highly limited, with major dependence on British communication groups. The presence of such groups also exists in the Catalan case, but the fact that major Spanish communication groups have radio stations based (in some cases historically) in Catalonia has not prevented the development of its own actors, of which there are two types: on the one hand, public actors. This act both for Catalonia as a whole or locally; and on the other, private actors, which suggests a certain normalisation of the region as a media system. Ownership, both public and private, of radio on the three territorial levels has acted as a stimulus for the creation of a competitive space.

This lower level of subsidiarity in Wales also appears when analysing the offer of programmes, with public services playing a prominent role. On the one hand, in Catalonia there are three groups that comply with this function: Catalunya Ràdio, Ràdio 4 and local public radio stations in general. Hence, Catalonia has its own actors that guarantee public service in Catalan. In Wales, this is the function of the BBC, which is dependent on London, and there is no actor playing the same role as S4C does in the case of television, i.e. that is an inherently Welsh entity.

In terms of language and audience, the reception of Catalan or local radio is greater than it is in Wales. This is highly related with the strength of the language in the territory, which acts as a barrier to entry for many possible listeners in Wales. Moreover, the areas where Welsh is most widely used tend to be those with deficient coverage and a more limited offer. Here we should also mention other inherent factors of radio traditions in Spain and the United Kingdom. For example, the major role of private broadcasters is related with the commercial nature of radio in Spain since its beginnings (Bonet & Arboledas, 2011) and with the presence of some of the biggest Spanish communication groups, something which does not occur in the United Kingdom, where they tend to be purely ra-

dio-based companies. In turn, the central role of the BBC in Wales is the clear legacy of a strong tradition of public service broadcasting in the United Kingdom, where commercial radio is a more recent phenomenon and carries less weight.

In terms of historical claims to language as one of the key elements of singularity and differentiation, its relation with the media has come to be a fundamental issue. Beyond the normalisation that can be produced through different regulations, in the Catalan case the audience has responded positively, given that the two news/talk radio stations with the most listeners are in the Catalan language. We could therefore speak of a contribution made by the radio system to the social normalisation of the language and towards entrepreneurial normalisation through it having become a commercial asset for attracting the audience. But this contribution has not been possible in Wales because private radio has made a priority of commercial interests ahead of linguistic issues. Therefore, sectors defending Welsh culture and society are demanding that the next legislative reforms should establish compulsory minimum amounts of Welsh language content when awarding commercial radio licenses.

Funding of the media has been determined by the dimensions of the market and by the public service finance model, which accepts income from advertising in Catalonia but not in Wales, which once again reveals the importance of regulation, the last of the dimensions analysed in this study. In the regulatory field, it is useful to work on the basis of the models proposed by Andrews (2006) to define the level of competence of a stateless nation. The Welsh case is identified with shared British sovereignty with the EU, in which stateless nations are consulted regarding questions that affect them. The Catalan case would be more autonomous, asymmetric broadcasting devolution within an EU member state, in which certain areas of this policy are the full responsibility of sub-state territories. The existence of its own regulatory body, i.e. the *Consell de l'Audiovisual de Catalunya* and even its own public broadcaster for the Catalan region that reports to the territory's institutions, is a clear example of this.

The lack of normalisation of subsidiarity (the reverse of what happens when applying this principle to the European Union and its member states) is causing tensions between the governments of stateless nations and those of the states to which they belong. Although Wales was already demanding independent broadcasting from London as early as 1944 (Evans, 1944, cited by Barlow, Mitchell & O'Malley, 2005), the limited degree of development of its own broadcasting system (to the extent that it is debatable whether we can even describe Wales as having its own media system) contrasts with what has been achieved by Catalonia, which even has a certain amount of autonomy with respect to the state system. The level of subsidiarity of the broadcasting system depends to a large extent on the political-administrative design of the political system: in Spain, each political-administrative level (state, regional and local) can develop its own media system. In the United Kingdom, the media system is much more controlled and centralised by the state government. This case shows, moreover, that a high level of subsidiarity in the broadcasting systems of stateless nations does not exclude the also relevant presence of actors from broadcasting systems associated with the state in which they are inserted, or with which they compete. And this is relevant because, as Jones (2007: 188) reminds us,

having access to communication media in one's own language can simultaneously be symbolic of the very essence for the struggle to ensure the future survival of the language in the modern world and provide a practical tool to enhance communication opportunities through the medium of that language and hence add to its use and usefulness.

Moreover, and obviously, it is a resource that generates wealth, jobs and welfare that can be managed from proximity, as defended by the principle of subsidiarity.

The lines of research that this study has opened include the role of the media systems of stateless nations in the states in which they are inserted. In this regard, the concept of subsidiarity that has been used here in exploratory fashion presents the potential to be developed in greater depth on a theoretical and applied level. Studies could be conducted of other dimensions of analysis, but in whatever case, it has been made very clear here that comparative studies of media systems can make a very important contribution to the analysis of the peculiarities of stateless nations.

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## Notes

<sup>1</sup> The number of inhabitants is a provisional figure from January 1, 2013. The other data are for 2012.

<sup>2</sup> The number of inhabitants corresponds to the last official census in March 2011.

<sup>3</sup> According to the last official census of March 2011, 562,000 Welsh people speak Welsh.

<sup>4</sup> Adults over 15 years.

<sup>5</sup> England has local BBC channels. However, the Sound Broadcasting Act of 1972 exclu-

ded this possibility for the so-called 'national regions', like Wales. In this case, the consideration of 'local' corresponds to the BBC Cymru Wales regional channels.

<sup>6</sup> The study itself explains that the figures do not add up to 100 because of duplicates.

<sup>7</sup> A percentage that is also higher than those for England, Scotland and Northern Ireland, and that is two points higher than the figure for the United Kingdom as a whole.

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