

GIBRALTAR BROADCASTING CORPORATION (GBC) REVIEW



November 2008

Preparing GBC for the next 50 years

AN INDEPENDENT ASSESSMENT FOR
THE GOVERNMENT OF GIBRALTAR

STRICTLY CONFIDENTIAL



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PREPARING GBC FOR THE NEXT 50 YEARS

Introduction

In June 2008 Group K Broadcasting Ltd was commissioned by the Government of Gibraltar to conduct a detailed review of GBC, and recommend changes for the future. The process included audience research in Gibraltar and on the Costa del Sol, an exercise that had not been carried out since 1986, three years before the advent of Sky and other satellite broadcasters. That research is now complete, and forms part of the overall review; please see ***GBC Audience Survey 2008*** for detailed results.

This Report is an initial summary of our findings for discussion, together with recommendations. In some areas it is not possible to be dogmatic, as the specific politics, culture and industrial practices prevalent in Gibraltar - including the role of the unions - must be given due consideration. However, where broadcasting rules are being broken we have made firm suggestions.

We hope this document will lead to further discussions on potential paths forward, likely costs, and methods by which current problems can be resolved. We would be most pleased to be involved in those deliberations.

We were given complete freedom to assess and investigate all aspects of GBC, and all information we requested from GBC itself and from Government was provided promptly. As a matter of record, everybody we have met or had dealings with - whether at GBC, the Government of Gibraltar or externally - has shown the utmost courtesy and given freely of their time and expertise. For this we extend sincere thanks.

The GBC General Manager retired in April 2007. Since then the four Heads of Department (News, Radio, Production and Engineering) have covered the position in an acting capacity on a rotational basis, each being in the role for three months.

It is important to make clear that, where this Report levels criticism at any aspect of GBC's operations or service to its audience, there is no intention of "pointing the finger of blame" at any individual or entity; rather, the conclusions drawn are a factual appraisal of the current situation, and recommendations for the future. The Review has considered GBC as a whole and, where appropriate, radio, television and online separately.

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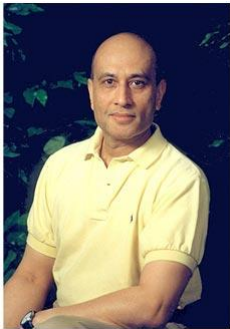
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Personnel

The following have been involved in the Review process:



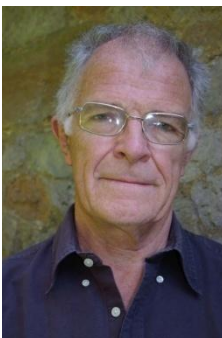
Allan King (AK), Chief Executive of Group K Broadcasting Ltd, was in overall charge of the Review and was personally involved at every stage. AK is also the author of this report



Arun R Gattani (ARG), Finance Director of Group K Broadcasting Ltd, advised on business and financial elements



Marcus Payne (MP), UK based television news director, visited GBC to evaluate programme production practices



Dr Graham Mytton (GM), formerly Head of Audience Research at the BBC World Service, was responsible for overseeing the audience survey. He visited Gibraltar for meetings at GBC and with Government



Plus Four, an independent, full-service market research company conducted the audience survey fieldwork in Gibraltar and Spain. The project was primarily handled by Research Manager, Dave Ruston (pictured)

Methodology

Our initial UK based research in June 2008 comprised collating information from the following documentation provided by GBC, via the Government of Gibraltar:

- Audited accounts for last three years
- Board reports
- Job descriptions for all posts *
- Overview of staffing *

* These did not tally as there is considerable discrepancy regarding job titles and descriptions

We compared this information to current working practices in the commercial and public service sectors in the UK to determine possible adaptations to bring GBC in line with present practice.

We also monitored, recorded and evaluated the output of Radio Gibraltar from technical and creative viewpoints, including music, news and current affairs programming.

Gibraltar 22 – 28 June 2008

AK spent this period in Gibraltar, based at GBC. Meetings with the four Heads of Department were followed by initial familiarisation with Broadcasting House and a staff meeting open to all employees and freelancers. This was attended by virtually the entire workforce.

Confidential, individual meetings with members of staff, of approximately one hour duration followed. Notes taken at those meetings have been used in the compilation of this report, although absolute confidentiality has been maintained throughout, and no attribution has been applied.

We also met with Richard Cartwright, Solomon Levy, George Valarino, and Union representatives.

We were provided with the only extant copy of the 1986 Gallup audience survey. This has since been scanned to a PDF file at our request, to provide a safety backup.

Gibraltar 14 – 19 July 2008

The remaining one to one staff meetings were held as, for reasons of time and logistics, several could not be scheduled during the previous visit.

AK then spent time with all departments to observe their working practices, including “hands on” sessions with Production, Radio and News departments observing pre-production and post-production systems and live transmission.

Discussions with Engineering department and familiarisation with technology currently in use at GBC also took place.

AK met with Chief Secretary, Richard Garcia.

London

Having established that the last full audience survey was carried out by Gallup in 1986, it was clear that the time for this work to be repeated was long overdue. Therefore, we appointed GM to oversee this vital phase, and commenced a detailed investigation of the market. As a result, nine research agencies were invited to bid, of which seven submitted proposals. After examination and discussion, Plus Four was commissioned.

Gibraltar 9 – 14 August 2008

An experienced television director (MP) from the UK accompanied AK on this trip and spent two working days on the project including monitoring GBC TV output and visiting Broadcasting House to study the technology and observe the compilation and live transmission of the evening news programme. MP’s observations and comments have been taken into account in compiling this report.

Also during this period meetings were held with: Minister Holliday (and Flavio Madeira); Paul J Canessa (and John Paul Rodriguez) of the Gibraltar Regulatory Authority.

Gibraltar 7 – 10 September 2008

AK was accompanied by GM to complete the necessary work before commencement of the audience survey. AK also held a staff meeting at GBC, again attended by all personnel, to update interested parties on progress.

In order for GM to compile suitable survey questionnaires for Gibraltar and the Costas, meetings were held with the GBC Heads of Department, and with Minister Holliday and Peter Canessa.

After return to London all stakeholders were consulted and appropriate questions formulated for the fieldwork to commence on 20th September.

Gibraltar 28 September – 3 October 2008

Meetings and further observation at GBC. AK also met with Tim Bristow, Chief Executive of Gibtelecom, and Edward Macquisten, Chief Executive of the Chamber of Commerce. Mr Bristow and Mr Macquisten gave of their time freely and were most helpful.

Gibraltar 19 – 23 October 2008

Radio Consultant Dan Harper, who provides two days of training for Radio Gibraltar staff every year, was booked for 21st and 22nd October. He was accompanied by Justin Kings, News Editor of BBC Radio London. AK observed the training and held two meetings with Mr Harper. Please also see below under Training – News, Page 28.

Findings

There is a most interesting dichotomy, almost a dual personality, at GBC: on the one hand the organisation has a demoralised, beleaguered atmosphere; on the other there is an almost palpable desire to see the situation improve, and for the Corporation - incorporating the brands "GBC" and "Radio Gibraltar" - to be an organisation to be proud of. This applies to all the people we met, which is exceptionally encouraging. However, while there is a good team spirit within departments, that does not apply to GBC as a whole, with individual departments operating in a degree of isolation. Friction is also a problem.

Naturally, staff opinions are often polarised, with some believing GBC is "finished" and others suggesting that no changes are needed. However, such views are very much in the minority with most people feeling that a GBC in one form or another should continue to serve Gibraltar, albeit with major changes.

There has been a serious breakdown in line management and human resources. Currently there is no Head of Finance (one result of which is a build-up of unpaid advertising revenue, please see below.) There is no proper HR function in place. Staff complain that their job grades and salaries do not reflect their actual roles. Indeed, the information provided by GBC showed numerous discrepancies between the job descriptions held on file, and the descriptions that staff believed were appropriate to their function. Many of these claims are valid, and in some cases the discrepancies date back a number of years.

GBC does not employ a Head of Sales, which is a most serious omission. The fact that the one, unsupervised, sales executive is able to generate considerable income, whilst commendable, strongly suggests that the revenue stream could be increased with a properly managed team. Alternatively, sales within Gibraltar, in Spain, or both could be outsourced.

There is an exceptional level of talent at GBC, particularly given the limited pool of people available in a territory with a comparatively small population. It is important that creative and technical people are nurtured, properly trained, and that they realise their abilities and contributions are valued.

One problem we encountered was a "job for life" mentality, something that has no place in a broadcast environment. The comment *"I have been asked to do something but have refused because it is not in my job description"* was also heard too frequently for comfort.

However, the breakdown of the management structure plays a part in this, as people feel there is a lack of accountability: there is a belief throughout GBC that a small number of the Corporation's employees go to work only to earn a living, with no interest in what they are producing, and that they are not held to account for their shortcomings and failures. In this respect there appears to be a lack of discipline, something that even union representatives highlighted.

We also identified a practice referred to as "acquired rights" whereby a member of staff who had held a particular post for a number of years could, apparently, claim a "right" to that position. Further, we understand that previous management has accepted that staff shifts cannot be changed without mutual agreement.

An example would be a radio presenter who had anchored a show for some years, refusing to move to a different time slot. This severely limits the ability of the Senior Presenter to schedule his presenters as he sees fit, something that is fundamental to running a radio station. The same holds good for television. In the worst case scenario this means management is unable to manage.

We are told the practice dates back to the time of the previous General Manager, and was upheld by him when staff complained that they were being asked to change shift. This has absolutely no place in a broadcast organisation.

At our request management has checked the Staffside agreement and confirms that there is no reference to the need for mutual agreement before a change of working hours. There is, however, a reference within the overtime/public holidays section to the need for 48 hours notice before any change in rostered hours.

Erroneous assumptions seem to have been made on both sides over the years, and those assumptions have materially affected staff rostering and, as a result, programme output.

Other working practices are, in many areas, poor. In the case of the evening news programme at 20.30 there is neither a formal pre- nor post-production meeting. Both are essential, and are basic requirements of good broadcast practice. Serious errors occur on air, and there is no follow up to ascertain what went wrong, and - vitally - how to avoid a recurrence.

Examples are numerous, such as a presenter's first link being made to the wrong camera. This gives the audience the worst possible impression of lack of professionalism at the very start of a programme; an impression that will persist.



www.gibfocus.co.uk

An example of a serious failing was the weekend News Review on Sunday 19th October 2008. The programme included coverage of the storms, and the bulk carrier MV Fedra that ran aground at Europa Point. There were several seconds of video showing the ship being battered against the shore, and waves crashing over the deck; but the sound was inaudible. To have such pictures without clear audio, when it is a key and essential component of the overall dramatic effect, destroyed the impact of the report.

The piece also featured an interview with the CM in which, while Mr Caruana was answering a question, we saw another shot of him talking to a group of people. This is poor practice.

The fact that this material was included in the weekend review meant it had first been broadcast during the week. For it to be transmitted once in such a form is unacceptable; for it to be aired again without correction compounds the failing. GBC management was unable to explain what had gone wrong as there was no follow up and no accountability.

We believe a probable reason for the unacceptable audio is the GBC practice of using one-person camera crews with no sound engineer, relying instead on camera sound. This is invariably set to automatic gain control instead of being adjusted for the requirements of each shoot. We are told that GBC very rarely deploys technicians for sound control, and even when it does their effectiveness is limited as nobody is trained in the discipline.

Although in better condition than television, radio suffers from trying to be all things to all people, targeting far too wide an age range. This will be covered in detail in the radio section below.

Problems at Broadcasting House include the lack of a green room, wardrobe and make-up facilities, and a properly catalogued tape library. We believe there is a wealth of archive material that is in urgent need of transferring to modern media and indexing.

There is no doubt that, for many reasons, GBC has not kept pace with the enormous changes that have taken place in Gibraltar, and does not reflect today's modern, dynamic society.

Tri-media

In the present media climate all elements should work together as an integrated **tri-media** whole:

- Radio
- Television
- Online

Currently GBC lacks cohesion between the three. In the tri-media industry in which it exists and functions, they need to integrate, be aware of each others' needs, and complement each others' operations.

Although sharing of newsroom output between radio and television does take place, cross-promotion of special programmes and event coverage is severely limited.

An example of how this should work is the Vanessa Feltz show which is broadcast at 0900 weekdays on BBC London 94.9. Every morning Vanessa appears live on the BBC *television* London news to promote her *radio* show and tell viewers what they can hear later that morning, the subjects she will cover, and the guests to expect. The same promotion appears on the BBC London Website. This is exactly how the three media should interact, and complement each other.

GBC's online presence does not reflect, promote or enhance either of the other two media, and this vital promotional outlet is simply not being used. Indeed, the GBC Web presence is exceptionally poor and diminishes, rather than augments, the brands.

Navigation is not intuitive, e.g. it is necessary to click on "About" (which is inconspicuous at the top of the screen) before finding links to TV and radio schedules, which should be prominently displayed on the home page. On two occasions we have found the TV schedules to be out of date, and on one occasion the "Audio News" link was out of date.

One page claims "*This page is designed to be friendly to visually impaired users*" but it does not appear to differ from other pages, and it is hard to find any justification for such a claim. It is highlighted in red in this screenshot:

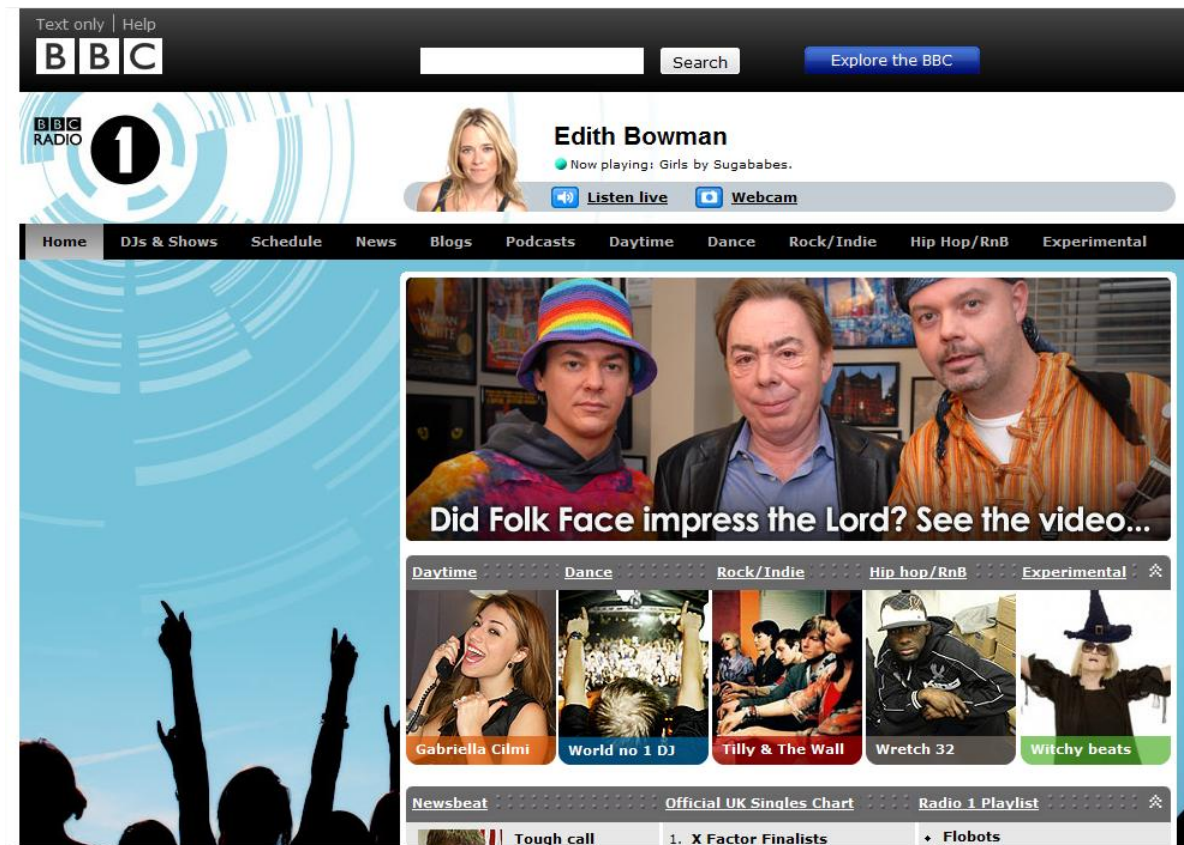


This could be quite irritating, even offensive, to those with visual difficulties.

As will be seen, the site is promoting RealPlayer 5.0, which is some years out of date, and there is a Windows logo that one would expect to link to Windows Media Player, but in fact links to a third party site.

The above is just one example of the poor standard of the GBC online presence; it does nothing to draw the user in. For comparison, we show a selection of effective UK radio sites:

BBC Radio 1:



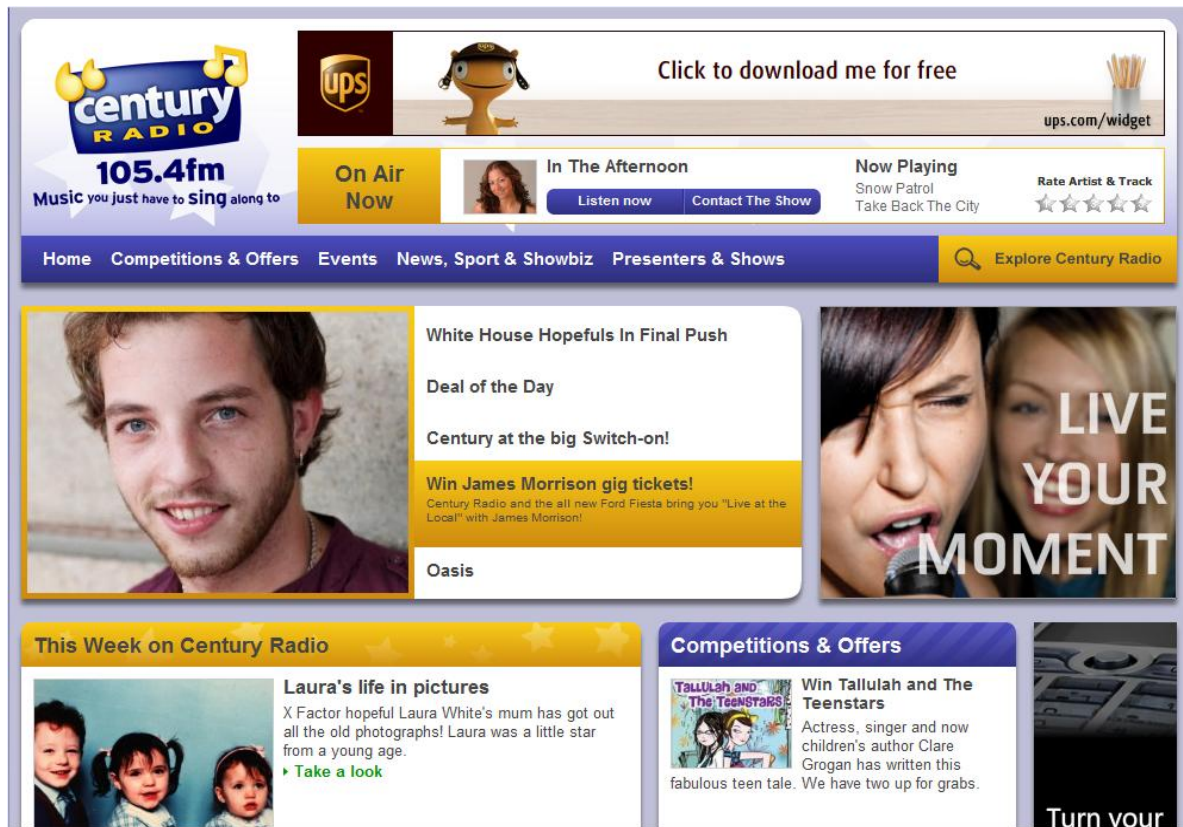
The screenshot displays the BBC Radio 1 website. At the top, there is a navigation bar with the BBC logo, a search bar, and a link to 'Explore the BBC'. Below this, the main header features the 'BBC RADIO 1' logo on the left and a profile for 'Edith Bowman' on the right, including a 'Now playing' status for 'Girls by Sugababes' and links to 'Listen live' and 'Webcam'. A secondary navigation bar lists various content categories: Home, DJs & Shows, Schedule, News, Blogs, Podcasts, Daytime, Dance, Rock/Indie, Hip Hop/RnB, and Experimental. The main content area is dominated by a large blue graphic on the left showing silhouettes of people with their arms raised. To the right, there is a featured video thumbnail with the text 'Did Folk Face impress the Lord? See the video...'. Below this, a row of five smaller thumbnails represents different music genres: Daytime (Gabiella Cilmi), Dance (World no 1 DJ), Rock/Indie (Tilly & The Wall), Hip hop/RnB (Wretch 32), and Experimental (Witchy beats). At the bottom, there are links to 'Newsbeat', 'Official UK Singles Chart', and 'Radio 1 Playlist', each followed by a small thumbnail and a title like 'Tough call', '1. X Factor Finalists', and 'Flobots' respectively.

95.8 Capital FM:



The screenshot displays the 95.8 Capital FM website. At the top, the station's logo is accompanied by the tagline "LONDON'S NO.1 HIT MUSIC STATION". A prominent UPS advertisement is featured, showing a cardboard box labeled "URGENT (Rollover to ship)" with the text "Quick! Get the package off your desk!". To the right of the UPS ad is a small cartoon character and the URL "ups.com/widget". Below the header, a navigation bar includes a "Listen Live" button, a search bar, and a list of menu items: HOME, LONDON GUIDE, ON AIR, MUSIC & SHOWBIZ, NEWS & TRAVEL, OFFERS & COMPETITIONS, CHARITY, and PHOTOS. The main content area is divided into several sections. On the left, a "ON AIR NOW" sidebar features a photo of Chris Brooks, his name, the time "1:00pm - 4:00pm", and the song "The Script Breakeven". The central section is a large banner for the "Jingle Bell Ball" competition, featuring a photo of a smiling couple and the text "Win Jingle Bell Ball tickets!". Below this banner, a section titled "TODAY ON CAPITAL..." is followed by "What we're talking about..." which includes a row of small thumbnail images. On the right side of the main content area, a vertical list of links includes "Jingle Bell Ball", "Who's playing at the Jingle Bell Ball", "More great competitions", "Latest music news", and "The line-up in pics".

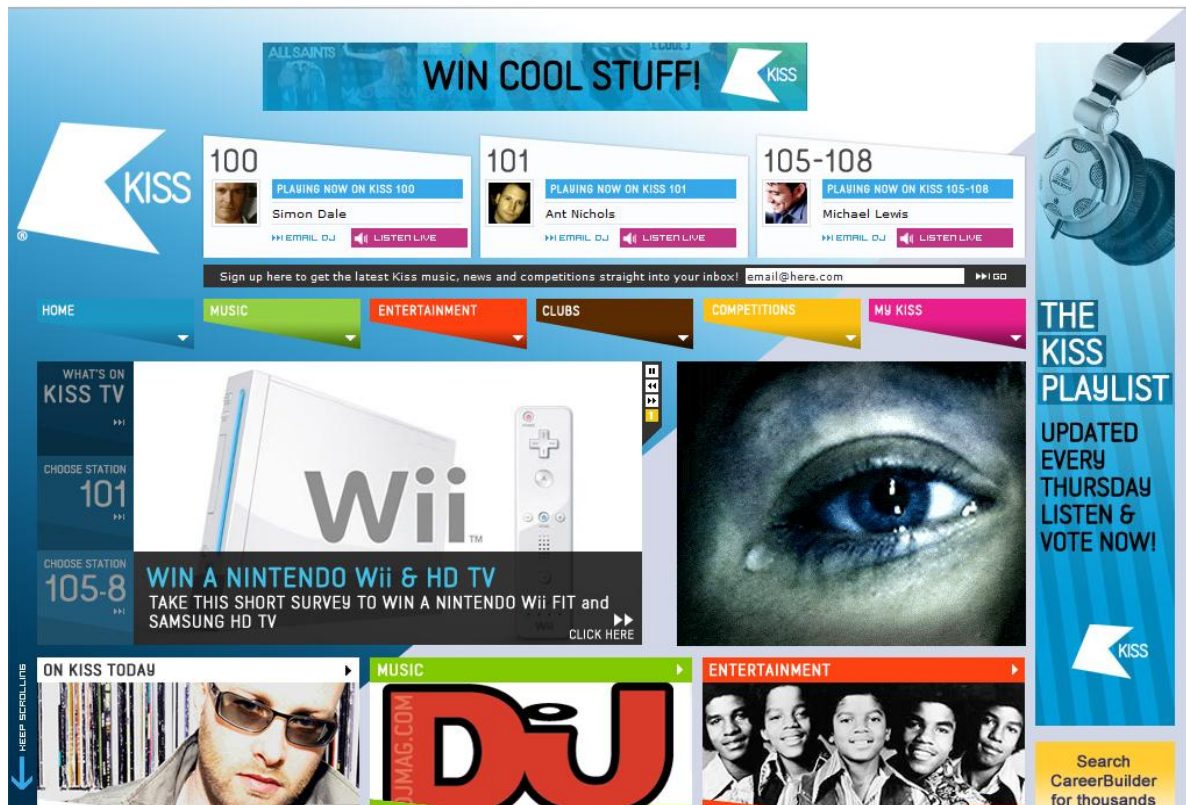
Century Radio:



The screenshot shows the Century Radio 105.4fm website. The header features the Century Radio logo with the tagline "Music you just have to sing along to". To the right is a UPS widget with a cartoon character and the text "Click to download me for free" and "ups.com/widget". Below the header is a navigation bar with links: Home, Competitions & Offers, Events, News, Sport & Showbiz, Presenters & Shows, and a search bar labeled "Explore Century Radio".

The main content area is divided into several sections:

- On Air Now:** A yellow box with a photo of a woman and the text "On Air Now".
- In The Afternoon:** A box with a photo of a woman, the text "In The Afternoon", and buttons "Listen now" and "Contact The Show".
- Now Playing:** A box showing "Snow Patrol" and "Take Back The City" with a "Rate Artist & Track" button and five stars.
- White House Hopefuls In Final Push:** A section with a photo of a man and text: "Deal of the Day", "Century at the big Switch-on!", "Win James Morrison gig tickets! Century Radio and the all new Ford Fiesta bring you 'Live at the Local' with James Morrison!", and "Oasis".
- LIVE YOUR MOMENT:** A large image of two women singing into a microphone.
- This Week on Century Radio:** A section with a photo of three children and text: "Laura's life in pictures", "X Factor hopeful Laura White's mum has got out all the old photographs! Laura was a little star from a young age.", and a link "Take a look".
- Competitions & Offers:** A section with a photo of a woman and text: "Win Tallulah and The Teenstars", "Actress, singer and now children's author Clare Grogan has written this fabulous teen tale. We have two up for grabs.", and a link "Turn your".

Kiss FM:

The screenshot displays the Kiss FM website with a blue and white color scheme. At the top, a banner reads "WIN COOL STUFF!" with a Kiss logo. Below this, three radio station boxes are shown: "100" featuring Simon Dale, "101" featuring Ant Nichols, and "105-108" featuring Michael Lewis. Each box includes a "PLAYING NOW ON KISS" status, a "EMAIL DJ" link, and a "LISTEN LIVE" button. A navigation bar below the stations includes links for "HOME", "MUSIC", "ENTERTAINMENT", "CLUBS", "COMPETITIONS", and "MY KISS". A large central banner promotes a contest: "WIN A NINTENDO Wii & HD TV" with a "CLICK HERE" link. To the right, a vertical sidebar titled "THE KISS PLAYLIST" states "UPDATED EVERY THURSDAY LISTEN & VOTE NOW!". The bottom of the page features a "KEEP SCROLLING" arrow, a "ON KISS TODAY" section with a photo of a man, a "MUSIC" section with a "DJMAG.COM" logo, and an "ENTERTAINMENT" section with a photo of a group of people. A "Search CareerBuilder for thousands" button is located at the bottom right.

All the above give the user many reasons to delve further. There are copious photographs, there are competitions, and they are user-friendly. They are also updated regularly.

Note the presence of advertising banners and competitions linked with names that are familiar to listeners. This is a revenue stream that GBC is entirely neglecting.

These sites are an integral part of the associated radio station, and each refers frequently to the other. The same principles are equally valid for television, particularly when it is at a local level.

Local news stories should also constitute a major section of the GBC Website, both as a part of a public service commitment, and as a portal that will lead naturally to other pages. Currently the Gibraltar Chronicle and Panorama are among sites offering news, and this is an area where GBC is well placed to compete.

If used well, the Website can be a most effective shop window where GBC can display the goods it has to offer. It can also provide feedback and interactivity with listeners and viewers. The audience needs to feel involved and included, trusting its favourite radio stations, TV channels and websites to reflect its opinions and satisfy its needs.

The Web is an excellent tool for this, but at present GBC's looks like an afterthought and does nothing to involve and include the audience. We understand design and maintenance of the site is outsourced. This function should be handled in-house and work hand in hand with radio and television.

Radio Gibraltar is available for live listening via the Web, or WiFi Internet radios, but the audio gain (available volume) appears to be much lower than other stations with similar programme output. We understand this may be a matter for Gibtelecom, who provide the audio streaming on behalf of GBC.

Branding

Effective branding is essential. People in the UK complain about the BBC, and the licence fee, but “BBC” remains a recognised and *valued* brand, despite recent controversies. GBC, on the other hand, is a *devalued* brand, and that is something that needs to be corrected by improvement to the television, radio and online product, and proper integration of all three.

We live in a multi-channel radio and television world, and people have a choice of listening and viewing. They are used to the quality, both technical and creative, provided by BBC, ITV, Sky and a host of other British and Spanish channels. They will forgive lower standards from their local broadcaster, but only to a very limited extent.

Therefore, GBC needs to maintain standards. This does not mean it should copy others, as it is unique and should make a virtue of that very uniqueness. But the tri-media production and presentation quality must be comparable with the other channels that the audience sees and hears.

The “face” GBC presents to the outside world, whether in Gibraltar or across the border, must also adhere to these standards. A re-branding exercise including a new logo and corporate identity is long overdue.

Radio Gibraltar

Radio Gibraltar is currently trying to target an audience covering the age range 30 – 60. This is far too wide. The most a station with this remit can hope to achieve is a degree of acceptability, but no great popularity.

If two radio stations were to broadcast, far better targeting could be achieved, and if Spanish language programming continued it could be confined to one station. A modified Radio Gibraltar could remain on air, with a new station broadcasting under a new name – “The Rock FM” perhaps? – targeting a younger audience.

Frequency allocations

FM

At present, with one radio station and an opt-out for parliamentary coverage, Gibraltar can be served by the three FM and one AM frequencies allocated to GBC. Although geographically small, the topography of the Rock means FM coverage of all population areas is not easily achieved.

Should the decision be made to expand the radio operation to two stations, it would not normally be technically possible to provide the population with FM coverage of both, although recent technology makes this potentially viable, please see Appendix A.

However, while investigating frequency allocations we discovered an apparent anomaly: although GBC only has three FM frequencies, BFBS has four, some of which are authorised at higher power. It is unusual – unique in our experience – for the national broadcaster, in this case GBC, to have an allocation that is inferior to that of a foreign broadcaster, here BFBS. BFBS also broadcasts two radio stations locally whereas GBC broadcasts only one, again a surprising situation.

Government of Gibraltar figures* as at 8th September 2008 show military personnel comprised:

- **504** military service
- **27** UK based civilians
- **537** dependents

*Source Tony Morris, MOD, via Government of Gibraltar

Therefore, including UK based civilians and dependents, the total target audience for BFBS is **1,068**. When we consider that the target audience of Radio Gibraltar is the population of the territory, the allocation of frequencies and authorised RF (radio frequency) power levels looks anachronistic indeed. Even more so when we include potential Radio Gibraltar listeners in the surrounding hinterland.

There are understandable historical reasons for this, explained to us by the GRA. However, with the much reduced military presence in Gibraltar now, compared to the time at which the allocations were made, we do not believe the anomaly can still be justified.

No doubt BFBS will highlight its Gibraltarian audience, but that is not its *target* and is not a justification for maintaining the status quo. We would counter that, if the people of Gibraltar are choosing BFBS in preference to Radio Gibraltar, the clear inference is that the latter is failing to provide what the audience wants, and must improve its technical, programming and creative standards.

The issue of frequency allocation becomes even more pertinent in view of interference from Spanish stations affecting reception of Radio Gibraltar in certain areas of the Rock. Some of these are legal broadcasters, but breaching their internationally agreed power levels and over-deviating their audio from the specified 75 KHz to, in some cases, as much as 250 KHz. This means they sound louder, but it causes co-channel interference, or “splatter” adversely affecting Radio Gibraltar transmissions. Other Spanish stations are illegal (“pirates”) which not only exhibit the above aberrations, but also operate on arbitrary frequencies.

With its much reduced target audience, it may be that BFBS does not need to cover the whole of the territory, but only certain sectors such as Devils Tower Camp. In this case it should be technically possible to re-engineer and downscale the transmissions, while still providing the same degree of coverage from two frequencies, by selectively re-using them in a way that avoids overlapping areas.

Notwithstanding the technical advances outlined in Appendix A, there is no doubt that an increase in frequency allocation and power would be of benefit to Radio Gibraltar as, if GBC could obtain one or more of the BFBS frequencies, two radio stations could effectively cover the area on FM. This has great potential.

GBC’s most recent FM transmitter purchases are capable of operating at the higher power levels of the BFBS assignments, and can be re-tuned to the BFBS frequencies. This would clearly reduce the cost of upgrading Radio Gibraltar’s FM capability.

GBC has recently conducted a local field strength survey of the GBC and BFBS FM frequencies. The intention was to verify correct propagation of transmissions from O'Hara's Battery, but the exercise has returned more information than first envisaged. This test will shortly be expanded to the Bay and Coastal Region, and GBC will inform us of the results when all tests are completed.

As the digital age is upon us, the time is right to address all these issues. As Spanish radio and TV transmissions are so close geographically to those in Gibraltar, cooperation with regulatory authorities in Spain would facilitate the process.

Please also see Appendix B for details of DRM – Digital Radio Mondiale.

Technology

The equipment in use at GBC is a mixture of analogue and digital. This is to be expected, as replacement and upgrading of technology has followed a digital route wherever possible, and this is the correct approach. The engineering team has very effectively integrated ageing analogue equipment with its modern, digital counterparts, the interfacing of which can be an exceptionally challenging task.

Care has clearly been taken to analyse and adopt equipment that can have life beyond the current analogue infrastructure, and into the forthcoming digital age. Where this not achieved easily, more attention has been paid to re-arranging and extending the life of core systems.

As a result, much of the digital technology can be incorporated into the infrastructure of a "new" GBC in new premises. From discussions with the Senior Engineer we believe, as at September 2008, approximately 25% of existing equipment could be re-used. This is expected to rise to approximately 35% by the first quarter of 2009.

Currently, GBC TV transmits in Standard Definition (SD) and in 4:3 aspect ratio. Much of the equipment is operating well beyond its anticipated service life and is in urgent need of replacement. It is important that new technology operates in an aspect ratio of 16:9 (widescreen) and HD (High Definition); capital expenditure on old technology would be a false economy, and would entail greater expenditure in the future. Wiring and DAs (distribution amplifiers) installed in any new premises should also conform to these standards.

A major power failure occurred during AK's visit to Gibraltar on 25th June 2008, and this put all GBC services off air. Broadcasting House (BH) itself was without power for approximately 4 to 5 hours from around lunchtime to 18.00/19.00.

In the past GBC had a measure of backup with a secondary (although reduced capacity) MoD feed to BH. This was also true with the previous radio installation at the Wellington Front studios.

However, over time the MoD has reduced its infrastructure, and this secondary MoD BH feed no longer exists. The physical cable remains, but it is now in effect fed from a council sub-station. Therefore, GBC no longer has the independent element of the backup supply, which now tends to be lost at the same time as the main feed.

At times of general power failure people rely on their (battery powered) radios to tune to their local station for information. Television is also an important medium where only certain localities lose power, and those with a supply can monitor local news. This also applies to civil emergencies.

It is important that radio and television remain on air, and are independent of external power. Emergency supplies in the form of generator facilities at BH, and generator/UPS (uninterruptable power supplies) for links and transmitter sites, should be in place.

Premises

GBC moved into the premises at 18 South Barrack Road in 1980. The condition both internally and externally is poor. There is a strong smell of damp in many rooms, including the boardroom. The structure is shabby and rundown with untidy and exposed wiring. We understand that most of the wiring dates back to 1980, and there are areas where it does need to be renewed. Apparently this has been postponed pending a possible move to new premises, something that also applies to other required maintenance.

We are advised that there are also serious issues with the fabric of the building, including unstable masonry, asbestos, and the state of drainage and water penetration. An example is regular flooding which recently caused major damage to the Radio and Newsroom area.

Concerns have been expressed with regard to falling masonry, and staff have resorted to clearing loose debris from walls and cordoning off some outside areas. All these issues would be expensive to resolve.

Vehicular access for scenery etc. is severely restricted. The layout of the building has become hemmed in over the years (for example with the build up of the nearby school facilities) making general access even more restrictive. The garage is now at full capacity, and housing new vehicles and trailers which are on order will be problematic.

Facilities for staff are poor, with neither a canteen nor even a vending machine, and few restaurants or cafes locally. Neither are there any showers.

By Gibraltar standards the location is too far from the main centre of activity. We are told that while people will visit the Chronicle offices with stories, a trip to GBC is considered to be too long a journey, certainly on foot. As a result, GBC has seriously limited visibility within the community.

GBC Management cannot tell us how much remedial action is the responsibility of the Corporation, and how much should be dealt with by Government. Whilst the government requires GBC to maintain the building, with their liability stopping at the front door, there are grey areas as other residential owners/tenants live nearby and in some cases actually on top of BH, sharing common structures and the electrical and water distributions.

For all of the above reasons we consider that the current premises are unsatisfactory.

Training

A high standard of ongoing training covering all creative and technical operations is a key requirement of any broadcast organisation. This is particularly so in the case of GBC, as the natural migration of staff between companies that you find in the UK, cannot take place where only one broadcaster exists. This is an area in which GBC is somewhat isolated, and formalised training is vital.

The following pages summarise the present training regime across the four departments, information having been supplied by the Heads of Department of Radio, Engineering, Production and News:

Training - Radio

At present radio has an annual two-day consultancy. This includes one to one sessions with presenters and general advice to the Senior Presenter. Additionally, from time to time presenters are sent on attachments with UK stations, for which GBC tries to obtain a bursary from the Commonwealth Broadcasting Association. The consultant is Dan Harper with whom AK held discussions in Gibraltar on 21st and 22nd October 2008. We were impressed and recommend that Mr Harper's consultancy is extended.

However, an annual two-day consultancy is far from adequate. It would certainly be enhanced with more frequent visits, which should also be reinforced by regular in-house programme and presentation appraisals. We understand these do not take place due to time constraints; in practice they are an essential tool for maintaining on-air standards.

Attachments and exchange visits to UK stations are also exceptionally useful, as they provide an insight into radio which is difficult to provide locally.

Specific courses for skills such as digital editing are also needed.

Staff currently visit the Sound Broadcasting Equipment Show (SBES) which has been established as the premier broadcasting event in the UK for over 30 years. This is valuable and should continue.

The National Association of Broadcasters (NAB) conference in London is also an essential industry event which GBC should attend.

Training - Engineering

GBC engineering has historically been given priority with regard to training. It has been felt that the department is most in need because GBC cannot call on external support, and therefore trained technical staff are needed to ensure systems remain operational.

Courses tend to be residential and costly, as they are tagged to exacting BBC standards, which are appropriate to a national broadcaster. Regrettably, budget constraints regularly result in the loss of programmed courses, as happened with the element of the MAC ICT networking and audio training last year.

The department has remained effective at incorporating certain specialised training to project purchases, such as with transmitter commissioning and the pre-testing of linking systems before leaving the factory.

The present wait for the final transition to digital is causing a significant skills gap, especially within the areas of signal distribution, transmission and testing. Specifically, the following relevant engineering areas should be considered over and above the training already implemented:

- Digital pre-training with test and measurement within the DVB-T & DVB variants
- COFDM microwave & Band III Links
- Studio SDI & HD integration
- Satellite
- ICT with convergence media training

Training - Production

There is no ongoing training programme for Production. Training is considered internally to be inadequate, and not properly funded. Although actually budgeted for, it is looked upon as "non-critical" and normally displaced by other priorities. Obviously skill and experience vary between members of staff, and training needs to be appropriately targeted.

The last two courses that Production personnel attended took place approximately two years ago. They were for instruction on the then new non-linear editing system and were held at a training centre in London over five days. Two members of staff attended. Although described as excellent courses, the belief at GBC is that they were largely ineffective because of timing: neither member of staff was considered to be ready, but we are told that senior management at the time insisted they attend.

Ideally, training should be applied across all production disciplines, including:

- Field Camera operations, aesthetic skills and lighting techniques
- Studio and field audio techniques
- Studio Camera operations and lighting techniques
- Studio floor management and PA principles & procedures
- Studio direction principles and Gallery skills
- Pre- and post-production planning
- Scriptwriting for TV
- Copyright and compliance awareness
- Photoshop, audiovisual and New media software

Having witnessed firsthand a programme in production that included an out of focus location interview with a Government minister, we feel there is an urgent need for specific training in this field. [REDACTED]

[REDACTED]

[REDACTED]

Training - News

The Newsroom has not had a structured training programme for at least 23 years. This is principally a consequence of lack of funds (other projects had priority) and the added pressure on staffing levels that would inevitably have occurred had reporters been absent for training. However, it is not an acceptable situation.

There has been some training on an ad hoc basis over the years, but not enough, and this shows in the on-air product.

All reporters would benefit from a news writing course. The style is often too formal and rigid. This also applies to presentation, which is an area in which training is lacking.

GBC is not as ruthless as it should be with its treatment of press releases, tending to regurgitate large chunks of copy instead of analysing and only using newsworthy material. In part, this is down to having to fill airtime, but it is also easier to reproduce press releases without being selective.

Radio and television require different writing styles, and tuition on scripting for both – and the reasons for the differences – would be of great benefit. Again, it comes down to the time and resources available: with just four reporters it is difficult to specialise.

ENG (Electronic News Gathering) camera techniques also involve specific skills, and training here would improve the product.

With the move to offline editing, the newsroom staff should also be trained in this field.

As mentioned earlier, Justin Kings visited GBC on 21st and 22nd October. His brief, as communicated to us by GBC management, included: *"... advice on news and cue writing, production of TV and radio bulletins, and presentation techniques, and advice on the TV news set as well as on the programme's concept generally."*

This caused us some concern as Mr Kings has, to the best of our knowledge and from reading his biography, no television experience. He is Head of News at BBC London 94.9, which is a radio station. It is true that the BBC London newsroom is a tri-media operation, and he works *alongside* TV and online. But this is somewhat different from working *in* television. His presentation to staff on the morning of 21st October was very effective, but the word "pictures" was not mentioned. Television news is picture led, and this omission was worrying.

This is not to criticise Mr Kings who is an accomplished professional and has a distinguished background in radio news. Our concern is that he might not be best placed to advise on television techniques (some of which differ in many ways from

radio) or the news set. However, there are undoubtedly areas in which he could certainly help.

GBC Management took note of our views and said it is only advice they would be seeking, with any advice available being considered worthwhile. They told us they are planning to revamp Newswatch in any case, and did not think it would be right to miss the opportunity of ascertaining Mr Kings' views.

Our concern was that any individuals or organisations contracted to conduct training for any GBC departments should be suitably qualified and experienced to do so. A perfect example is Engineering, where BBC courses are the preferred option. Indeed, there are none better.

Advertising

The total figure for advertising sales* for the 12 months to 9th October 2008 was **£194,803.09**. However, the level of bad debt on the same date was **£73,786.07; £44,015.92** of this was older than four months. This is wholly unacceptable.

The sales figure is commendable given the lack of a sales department or outside agency; the function is handled by one member of staff and a handful of agents selling on a commission basis.

The issue of bad debt needs to be addressed as a matter of urgency, and we are told the following action has been taken:

- The programme and billing times associated with Airwaves (Sales computer programme from RCS - Radio Computer Services) have been revised;
- RCS training has been implemented;
- New sales procedures and an incentive scheme to recover specific bad debt are in place.

As a result, GBC management believes that, in October 2008, the figures will start to show a reduction of a good measure of this outstanding debt in a fairly constant manner over the longer term. It is essential that this is closely monitored, and stringent steps taken to avoid a recurrence.

*Source: GBC

Finance and Accounts

GBC does not have a financial controller, or even a credit controller, at present. The accounts up to trial balance are handled by a clerk without any formal qualifications, although this is largely offset by experience. The member of staff has been with GBC for many years and has mastered all the in-house needs by doing, rather than by academic learning. She handles cash flow, remuneration, banking transactions, etc. and in this respect is described as very organised and efficient.

The monthly management and end of year accounts are outsourced to Baker Tilly. This has not always been the case, as the accounts were handled by a Head of Finance until his retirement in the mid 1990s.

Because GBC is government funded it is officially audited by the Treasury and is required to forward end of year accounts to it. The Corporation is subject to a physical audit during the year.

While we are certainly not suggesting any impropriety, the excessive reliance on one staff member with no head of department in place, is unsatisfactory.

Recommendations

Television

Public Service Broadcasting is a definition of radio, television and online media that are entirely or partly funded by the public. That funding can be in the form of a specific tax such as a television licence fee, direct funding by the state, voluntary donations, public subscription, or a combination of these.

Revenue from advertising and/or programme sponsorship might or might not form part of the business model of a public service broadcaster.

GBC falls firmly into this category, with its mixture of state and commercial funding. As the only broadcaster in Gibraltar, and having a public service remit, it has a duty to fulfil that role efficiently, effectively and in a manner that the audience responds to positively; such programming does not have to be staid or “worthy” although it must undoubtedly be worthwhile, and must maintain the highest production values.

Politics are of great interest and importance to the people of Gibraltar, and this is an aspect of Gibraltarian life that should be covered regularly, frequently, and in detail. It is vital that such coverage is scrupulous in maintaining absolute independence, and is demonstrably unbiased. Any suspicion that a broadcast organisation - whether radio, television or online – is biased, or a “mouthpiece” for any party or organisation, is deeply damaging.

But Public Service Broadcasting is about far more than politics; it must cover all aspects of its audience’s life and interests.

The **GBC Audience Survey 2008** gives detailed results for customer satisfaction with GBC’s radio and television output, and desires for the future. As stated, it forms part of the overall Review. However, some brief extracts are worthwhile here to illustrate audience reaction to GBC TV.

There is a very clear preference for locally produced television programmes. News and news-related material is popular, with 83.5% of viewers saying they usually enjoyed watching Newswatch, or had enjoyed watching it recently. It is a favourite with both male and female viewers, and among people of all age groups. Sport and entertainment are also appreciated by many viewers.

The following table shows the response when people were asked which programmes they usually enjoyed watching, or had enjoyed watching recently:

Newswatch	83.5%
News Headlines	53.0%
Viewpoint	26.4%
Talk about Town	23.0%
Sports Report	16.6%
Miss Llanita International	12.4%
Cinema, Cinema, Cinema	6.9%
Summer Nights 2008	6.5%
The American Chart Show	3.1%
In Him I Trust/Religious Programmes	3.1%
Animals in Danger	2.7%
Gillette World Sport	2.5%
Heritage Talk (lecture)	2.3%
Taste the Difference	1.6%
Cybernet	1.6%
The Men Who Made The Movies	0.9%
Living Coffee	0.8%
London Live	0.7%
The American Film Theatre	0.7%
Challenge in Mare Nostrum	0.5%
All Saints	0.5%
Kick	0.1%
Harry's Practice	0.1%
Guy Harvey's Portrait of the Deep	0.1%
Other	2.7%

This shows very clearly the demand for programmes directly relating to Gibraltar, and the interest the population has in them.

There is exceptionally strong support for a credible and effective GBC, with very few of those questioned believing it is unnecessary. At the same time there is a desire to see it change, and to make more programmes about Gibraltar life, culture, sport, music etc. 62% agree strongly with this, and 23% agree to some extent.

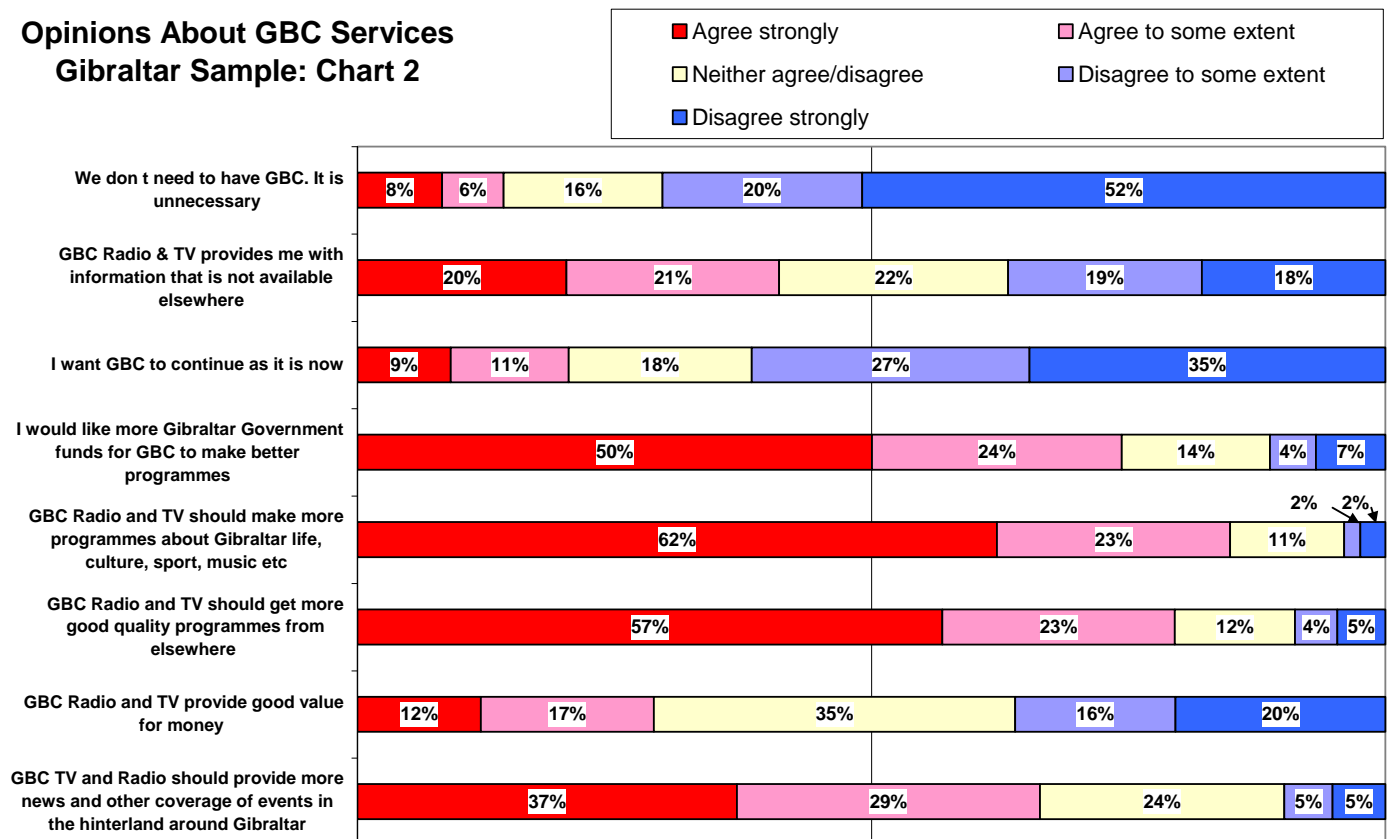
An increase in Government funding is also supported by the majority of respondents, with 50% agreeing strongly and 24% agreeing to some extent, meaning almost three quarters of respondents want GBC to be better funded.

However, a mere 12% agree strongly that GBC currently provides good value for money, with only a further 17% agreeing to some extent. Just 9% agree strongly that GBC should continue as it is now, with 11% agreeing to some extent. The majority - and by a large margin - want it to change.

More news and coverage of events in the hinterland around Gibraltar would also be popular, with 37% strongly agreeing, and 29% agreeing to some extent. Very few people held negative views.

The above figures are extracted from this table:

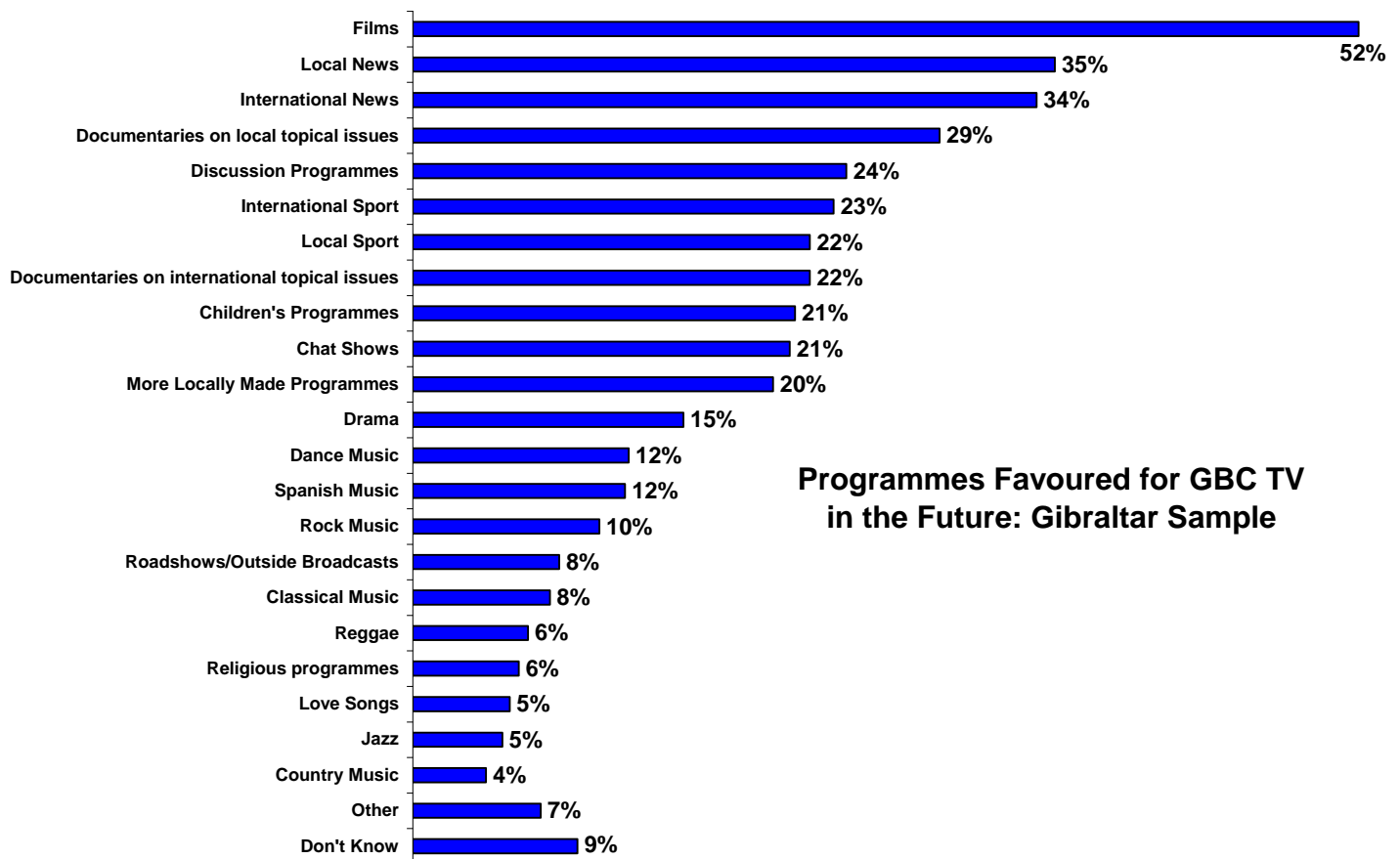
Opinions About GBC Services Gibraltar Sample: Chart 2



It is important to note that, although GBC TV programmes are watched, the audience believes that production quality needs to improve.

Audience response indicates that people want and value GBC, but are far from happy with what they see (and to a lesser extent hear) on air. As noted, there is a strong desire for more locally made programmes, and support for more Government funding to finance production.

When asked what programmes people would like to see on GBC TV in the future, local production again featured strongly, only being surpassed by films, which are a perennial favourite with audiences worldwide. The following table shows the results:



All the foregoing is extracted from **GBC Audience Survey 2008** pages 37, 38 and 40, and more detail appears in that document.

We now know that there is a serious demand in Gibraltar for local programming on television. We know the programmes to which the audience is responding positively, and what that audience would like for the future. Crucially, we also know that people support the concept of Government providing the necessary funding to make this possible.

To its great credit GBC has invested in digital non-linear editing facilities, which make high quality production cost-effective. Proper training and staffing are needed, as is reliable origination equipment – cameras, audio, links etc. – that meets the appropriate technical standards.

Currently, this is a matter of concern. We have seen internal memos that have been written following, for example, serious failings during outside broadcasts. Those memos reflect the frustration felt within GBC at the difficulties faced by producers and their teams. These core issues would need to be rectified before any expansion of production is considered; the audience will not accept an inferior product, no matter how well intentioned its production might be.

As well as news, discussions, current affairs and politics, there is a wealth of local material that should be included in a magazine programme format. It is only necessary to look at local printed media to see how much is going on in Gibraltar, and there is an audience hungry to see this on TV, and hear it on radio.

Production and News departments tell us that current staffing is inadequate to deliver a satisfactory level of quantity and quality. This is also clear from watching and listening to output.

At present, the daily Newswatch programme broadcast at 20.30 is a mixture of genuine news coupled with sport and community interest items such as cheque presentations and awards ceremonies. The latter are not news and do not sit well in the context of a news programme. However, they are certainly of interest and should be covered.

These and similar items would form a natural part of a magazine programme, for which we believe there would be a ready audience. Therefore, consideration should be given to producing a daily community magazine show to be broadcast on weekday evenings. This would increase viewer loyalty by producing content of ongoing interest to the local audience. It would also project Gibraltarian culture, society and heritage locally and in the hinterland.

Special interest programming should be produced in parallel to the regular programme. A compilation of the week's magazine programme would be broadcast at the weekend.

Provision should also be made for in-depth documentary series and/or one-off specials. It is important that the possibility of overseas sales for these programmes is considered throughout the planning and production process, to maximise any potential income from this source.

Programmes must have a modern and fresh presentation style, and there are several potential formats. As the Audience Survey indicates, consideration should be given to coverage of events in the hinterland that impinge on the many Gibraltarians who live or visit there, and might also be interesting to local people. However, there are political implications and it is a matter only for discussion at this stage. If this route were to be pursued it would need to be very closely monitored and sensitively handled.

There is disagreement between the News and Production departments as to which should be responsible for Newswatch (or a renamed news segment) and whether or not it should be part of a magazine show. This underlines the need for cohesion and leadership. Nevertheless, there is a wealth of ideas within GBC, and harnessing and directing those ideas would lead to some excellent programme material. There is a level of agreement that 15 minutes would be a workable duration for news, and would avoid the excessively long reports that are currently aired.

Sport

As well as a regular contribution to the magazine programme, a weekly half-hour studio based report could be produced, featuring live interviews and special reports.

Close coordination with “magazine” production would facilitate mutual promotion & content sharing.

Bought-in Programmes

As demonstrated by the audience survey, there is little justification for many of the current shows. They do not relate in any way to Gibraltar, and are simply a cheap way of filling air time. GBC’s *raison d’être* is its service to Gibraltar and Gibraltarians. We believe the bought-in programmes should immediately be reviewed. There is a case for shows that are of genuine local interest, providing they are cost-effective; a bought-in show that the audience appreciates is far better than re-broadcasting Radio Gibraltar on the TV channels.

Styling

At present no advice on clothes and make-up is given to presenters, and frequently they wear clothes that are unsuitable for television, which has specific technical requirements. A complete styling exercise should be undertaken.

Set

The Newswatch set is badly showing its age and a re-design is a necessity. The decorative tubular lamps on the rear flat can also be seen outside a restaurant at Queensway Quay. Every part of the set should be purpose-designed, not bought in a high street shop; the latter makes the on-screen product look cheap.

The sets seen by the audience on UK and Spanish channels are generally of a high standard, and in keeping with the 21st Century. GBC needs to present an equally professional, modern image. Techniques such as chromakey (blue or green screen) are not used at GBC, and are essential to modern broadcasting. They can also be invaluable in set design. Please see Appendix C for technical details.

Training

Proper training should be given to all on-air personnel. At present the style is staid. Even more crucially, presenters read words on Autocue, but do not tell the viewer a story. There is a very specific skill involved in imparting information so that it enters the viewer’s consciousness without any effort on his or her part; that skill is lacking at GBC.

Recommendations - Radio

Even with the current frequency allocations and very modest additional staffing, the content could be split into two stations.

A modified form of the existing Radio Gibraltar would handle all speech including news and Parliament. It would be a balance between topical and local interest news and affairs mixed with music aimed at an older audience. This would range from the 1950s to the 1980s. Although FM coverage would be ideal, AM would be acceptable.

Retaining the Radio Gibraltar brand would be very popular amongst the targeted demographic. Radio Gibraltar would maintain its local news coverage and its heritage position in the market.

A new FM station would bring in the younger audience which so far has had to settle for BFBS or Spanish stations. It would also serve listeners who like to listen to the radio for music and entertainment rather than news. "The Rock FM" would cover the coast to Spain, and a well programmed blend of contemporary "feel good" hits would stand up against the Spanish stations.

The idea is to have a strong station that markets the area and publicises all that Gibraltar has to offer.

The new audience would grow older with the new station, developing a life-long, sustainable loyalty to the GBC brand.

The speech station obviously needs the bigger budget, but both can share resources and can be run with just a few more staff than currently employed.

To be credible in today's competitive marketplace the FM station needs a strong personality breakfast show with a male and a female presenter. This should be fun and interactive. A marketing campaign needs to push this show to the forefront of Gibraltar media.

A high profile is essential, with the station and its presenters visible at as many openings, road shows and public appearances as possible.

The station needs a "star" and that star will be the basis for the rest of the days listening. If the audience starts the day listening to The Rock FM, they won't feel the need to tune around when the show is over; it will set the scene and lead the way for the other presenters to follow. The rest of the team would have to strive harder, with the new voice introducing some much-needed competition.

The website obviously needs a lot of work (please see below for online recommendations.) An entirely new site, designed by people who specialise in radio websites, is a must.

Marketing would be the key to getting the message across that there are two new stations in town, but this can only be done when the product is 100% right.

Much of the infrastructure is already in place:

- A good music library exists
- Transmitters are on-air (but please see earlier comments re. frequency allocations)
- The major staffing requirements are covered

The only programming work needed would be making new Sweepers/Jingles for The Rock FM, and training staff. The expenditure required to establish and run two radio stations has the potential to generate additional revenue. If airtime sales are handled effectively, the surplus could – indeed should – exceed the costs.

Local news is provided by the GBC News Department, with international material coming from the BBC World Service. While this is a highly creditable source, the emphasis is not ideal for the market. Consideration should be given to alternatives:

1. **Sky News Radio** – a good quality service providing news to UK commercial radio stations;
2. **IRN (Independent Radio News)** – a similar product to Sky News Radio;
3. **An independent news contractor;**
4. **In-house writers employed by GBC** and writing from news agencies such as Reuters, AP, AFP, Press Association etc.

Options 1 and 2 are likely to be the most economical, with option 1 our preferred choice as the quality of news reading is generally of a higher standard than option 2. Sky News also has a high profile in Gibraltar, as demonstrated by the audience survey.

Recommendations - Online

The Web presence is in urgent need of a total redesign. As previously stated, we believe the current product is damaging to GBC's reputation.

We recommend a corporate GBC Website with sections for television and each radio station. The look and feel should be consistent throughout.

It is important that the design is contemporary, and the initial work should be contracted to a design house with experience of handling sites for the broadcasting industry.

People browsing the site should be drawn into the experience and led seamlessly and naturally from one element to another. It needs to provide a shop window, but must also be a two-way street, with interactivity at all stages, thereby making the audience feel included and part of the GBC "family."

Streaming of radio, which is online now, should remain (with audio gain being corrected.) The television output ought also to be available, plus the facility to watch news bulletins from the previous week. The BBC's Listen Again service for radio, and iPlayer for television, are good examples. Other channels have similar offerings.

Local news stories should also constitute a major section of the GBC Website, and a "blog" would be a worthwhile addition.

The Website is a potential source of advertising revenue, and should be sold alongside radio and television. Advertising must be non-intrusive and must not irritate the user. The BBC News Website when seen in India is a good example, with a discrete advertising banner at the top of the screen (this does not appear when the site is viewed in the UK or Gibraltar.) At the other end of the scale is the Sky News website which, although in most respects a creditable product, has far too much commercial distraction.

Once the initial design work is complete and the site online, it should be maintained and regularly updated in-house.

It is possible for a Website to fulfil all the above requirements, and to give a good impression of an organisation, without being unduly expensive.

Recommendations - Sales

There are two possibilities:

1. A senior sales manager could be recruited, perhaps from the UK, to train staff and manage a team of sales people. We understand that potential clients in Gibraltar have not had a major television, radio or online sales pitch before, so the market is almost virgin territory to a professional.

This would certainly make GBC a powerful medium for advertisers. Within the same market size in the UK (est. 30,000 people) radio stations alone are making greater sales than GBC radio and television combined. When we consider that they are competing with as many as fifteen other radio stations, some of them local, plus television, the potential becomes clear.

2. The entire sales operation could be contracted out if a suitable sales house exists locally. Several companies have been suggested to us, and this would need further investigation.

Recommendations - Engineering

The interfacing of ageing analogue technology with its modern, digital counterparts has already been covered. This should continue, with GBC radio and television becoming fully digital as quickly as possible.

Television is currently broadcast in analogue format, but these transmissions will cease by 2012, in line with the UK move to digital. There are also implications for radio, as DAB (Digital Audio Broadcasting) will use some frequencies that will become free at the time of analogue television switch-off.

We have held detailed discussions with the Senior Engineer and are satisfied that this aspect of GBC is in good order, and the necessary mechanisms are in place for a seamless transition.

Radio is broadcast on AM and FM. As well as DAB, other future platforms to be considered are:

- Sky
- Freesat
- Other satellite services
- Freeview
- DRM

Sky is an established medium for radio and well as television. It is increasingly accepted by the audience as a viable means to listen to radio.

Freesat is an alternative to Sky, jointly owned by the BBC and ITV and run on a not for profit basis. It also hosts a number of radio stations, and more are joining it regularly.

Freeview is the UK digital terrestrial service. A range of radio stations is available.

DRM is covered in Appendix B.

A combination of the above would give Radio Gibraltar (and a second station) a profile outside Gibraltar, something many stations consider important.

Obviously GBC TV could be distributed on these platforms (with the exception of DRM which is an audio medium only) but the cost would be greater. However, online streaming via a new Website would be a cost effective alternative.

Recommendations – Staffing

A balance must be found whereby GBC is an efficient, lean operation, without being understaffed. Inadequate staffing leads to inferior programming, which in turn results in low viewing figures, and that reduces the income available from advertising. Sufficient staff levels are essential to produce a good quality product.

An example is the Newsroom, which should provide suitable material for radio, television and online services. Writing style is different for all three; it is not appropriate to take a script written for television news, and read it on radio, or vice versa, yet this is happening at present.

We are aware of occasions when a radio news bulletin broadcast on Monday is the same as that transmitted on the previous Friday, simply because it has not been updated during the weekend. This is an unacceptable practice and should cease immediately. The Newsroom should have sufficient journalistic cover to ensure that stale news is not regurgitated.

We also saw a Newswatch report being assembled for which graphics were essential. In the event they were only added because a cameraman with the necessary skills happened to be on the premises. If he had been away on an outside broadcast, or unavailable for any reason, no other member of staff could have undertaken the quite simple task; a perfect demonstration of the need for both multi-skilled personnel, and appropriate staffing levels.

It is important that sufficient staff are employed to cover programme, production and administrative needs. However, an enhanced level of multi-tasking would help to keep overall staffing within manageable levels. As previously stated, a fundamental change in attitudes and working practices is called for. We believe this can be achieved with the right motivation.

Pay structure

There are inconsistencies in many areas, and a belief within GBC that salaries should be at par with those paid in regional BBC stations. The problem is that the roles do not directly relate, so there is no exact template on which parity could be based, even if it were desirable.

In the UK, broadcasting is a comparatively well paid industry (particularly the commercial television sector) and we believe GBC employees should be appropriately but not excessively remunerated. The process must be entirely fair to both staff and the Corporation. An incoming Chief Executive would have his or her own ideas, but these should take account of pay scales operating in Gibraltar; UK rates cannot simply be transposed.

Alternatively, a Remuneration Committee could be formed, working in conjunction with the Chief Executive, Government and possibly senior management. This will depend to a large extent on the business model adopted.

Recommendations - Business Model

The future business model for GBC – if it is to change – will be a matter for Government, in light of prevailing local conditions. However, we believe the present structure is unwieldy and incapable of operating efficiently. As stated, we also believe it would be virtually impossible to remedy the manifold problems if GBC were to continue in its present form.

We understand the current need for a Board, but we are told that policy decisions are not taken by the General Manager, but referred to the Board for a decision. As the latter is not comprised of broadcasters, this is far from ideal.

The old BBC Board of Governors had responsibilities under the Corporation's Royal Charter to protect the independence of the BBC and to ensure the impartiality of its programmes. However, that Board was abolished in 2005, and replaced by two separate new bodies - the BBC Trust and an Executive Board.

Several possibilities exist for a "new" GBC. According to the Corporation's Website: *"The Corporation was established in 1963 with the amalgamation of Gibraltar Television, a private company, and the Government owned radio service, Radio Gibraltar which started regular broadcasting in 1958."*

In 1992 a separate entity called StraitVision was formed, with the remit of providing programming for GBC. That project ended in 1996, for reasons that are outside the scope of this Review, but should be taken into account in the event of a similar model being pursued in the future.

So, GBC has a history of private and government involvement. Future potential models include:

- **Retention of public corporation status** funded by a combination of Government grant and advertising;
- **PFI - Public Private Partnership (PPP)** the umbrella name given to a range of initiatives which involve the private sector in the operation of public services. The Private Finance Initiative (PFI) is the most frequently used, and could be applied to GBC if a suitable partner or partners were found;
- **Selling GBC to the private sector** as a going concern, albeit with serious problems.

In addition to any decision on a suitable corporate structure, consideration also needs to be given as to how GBC's broadcasting model should operate. Ought all production, sales etc. to remain in-house, or should any element be contracted out? Would a modified version of the StraitVision arrangement be viable, and preferable to GBC producing its own programmes? Or would it be counter-productive?

Quality of output and cost of production need to be considered in detail, but there are also political and cultural implications which mean firm decisions on these issues need to be taken in consultation with Government. They are also matters on which an incoming Head would wish to be deeply involved. However, we are happy to discuss these points in more detail. Thorough costing is obviously essential.

If our recommendations are accepted and acted upon, funds would need to be apportioned to compensate staff who have genuine grievances, and draw a line under all the problems of the past, to facilitate a fresh start.

Redundancy packages would also need to be discussed at Government level.

Conclusions

GBC is at a crossroads, and the possibilities to be considered are:

1. In this multi-channel age, with the population able to view and listen to a vast range of television and radio stations, is there a need for Gibraltar to have its own television and radio services?
2. If yes, does GBC continue as an understaffed, undertrained and underfunded organisation, producing a product considered by its audience (and within the Corporation itself) to be sub-standard? Or should it be re-formed as a new organisation operating as a business, fit for the digital age in which we now live?

Our recommendation is firmly in favour of the latter, but significant changes will be required, including a complete overhaul of working practices, management and staff structure.

In the foregoing we have outlined the problems we have identified at GBC, and how we see it developing and changing to reflect a modern Gibraltar, and demonstrating good broadcasting practice.

There are many different ways to achieve this, as evidenced by the divergent views within GBC management and staff. Several departments have submitted their own proposals to us, and these are available on request.

It will be for a new head of GBC, in consultation with Government and senior staff, to define the precise business structures and programme formats.

Therefore, our recommendation is that a new post of Chief Executive be created, and that GBC operates as a commercial business, with funding continuing for the present to come from Government and advertising.

The aim should be to improve radio and television output to attract a viable audience, and for sales to be professionally organised and targeted. If these improvements are implemented, the potential exists to make GBC not only self-supporting, but a profitable business in its own right. However, there is no doubt that considerable initial capital expenditure is a prerequisite.

The estimated figures for that, and for continuing running costs, will obviously depend on the business model adopted, and other variables, and are outside the scope of this Review. Nevertheless, this is something we would be very happy to discuss.

If the market is to be opened up to commercial competition GBC needs to be in a position to compete - something it would be unable to do at present.

Gibraltar is a vibrant territory hosting major international organisations in the banking, finance, insurance and gaming sectors. GBC can be a source of pride to the Government and people of Gibraltar, but only if it embraces the creative and technical standards that viewers and listeners are used to and expect. We do not believe GBC is viable and capable of doing so in its current form. A line needs to be drawn under "old GBC" which should close down at midnight on a specific date, re-opening as a "new GBC" at 06.00 the following morning. Strong marketing and promotion would be required in advance of the changeover.

It is vital that GBC serves the people of Gibraltar. There is a strong case for attracting advertising from across the border, but to do that it is obviously necessary to broadcast programmes on radio, television and online that attract an audience. This must be done in such a way that the core audience – Gibraltarians – do not feel disenfranchised. The public service element of GBC's output is, and should remain, very much a part of Gibraltar.

As stated under Findings, the GBC management structure has collapsed and there is a most unfortunate lack of respect; indeed, a culture has developed within the organisation where respect for management has been eroded to the extent that it is virtually non-existent. In many cases this also applies to respect for colleagues, and between departments.

There is undoubtedly some "dead wood" amongst the staff, just marking time until retirement, and this needs to be eliminated. Issues such as "acquired rights" must be addressed, and good working practices including programme meetings put in place. Follow-up procedures after on-air errors should be implemented so that steps can be taken to avoid recurrences.

However, a degree of the core talent and enthusiasm to make the necessary changes exists within the organisation. With the right business model plus suitable premises, training, equipment and strong leadership, we have no doubt whatsoever that GBC can become a brand of which Gibraltar can be justly proud, offering a first class service. It would be a great pity if that opportunity were to be lost.

We believe the overriding priority should be to appoint a Chief Executive with experience of business, radio, television and online, to steer GBC into a new era.

Unfortunately, if anyone within GBC itself were to be appointed to run the Corporation they could well encounter difficulties with their management colleagues. While all departments agree that change is needed, there is no consensus as to the form that change should take, and how GBC should operate in the future. Where a situation exists with one department believing it is the mainstay of GBC, another feeling it is the backbone, and yet another insisting it is the Corporation's success story, the pitfalls are obvious.

The fact is that all departments constitute a vital part of GBC, and all must play their part as an element of a cohesive structure.

The absence of respect would also be a major issue, as GBC needs a leader who will command the respect of all departments, and be able to motivate people to embrace the major changes that are needed. It will not be an easy task, and the process of appointing the right man or woman to undertake it, either from within Gibraltar or outside, should begin without delay.

This Review has had a galvanising effect on staff morale, but the stage has been reached where people need to be convinced that change is genuinely taking place, and that it is change for the better.

Transfer of operations to suitable premises should begin as quickly as possible, but improvements could be made to radio, television and online output immediately and at modest additional cost.

We mentioned in our initial Findings that GBC is largely isolated from other broadcast organisations. This was highlighted when we discovered that the Newsroom does not use a dedicated computer program to generate scripts, running orders etc., but relies on Microsoft Word.

We also witnessed a journalist dictating headlines to a secretary, who saved the file to floppy disk, which was then taken to the gallery and inserted into the Autocue system. This is an outmoded method of working.

When we asked why GBC does not use a program that handles all these requirements and more, it became apparent that Management was not aware that such facilities exist. Again, we are not being critical; simply emphasising the hurdles that need to be overcome.

Some years ago a well-known mobile phone service coined the slogan "The future's bright." For GBC, the future *could* be bright. A new, revitalised GBC has the potential to serve the needs of Gibraltar, provide a product that will appeal to the English-speaking communities across the border, and become a successful business in the process. We hope the ideas outlined here will form the basis for a GBC fit for the next 50 years.

Appendix A

Although, technically, additional FM allocations are preferred, there is a possible alternative should the decision be taken to operate two radio stations: historically it has been virtually impossible to operate two FM transmitters on the same frequency where there is any overlap in coverage. The problem is that the two signals conflict with one another and cause distortion to reception in areas where the overlap occurs.

However, recent developments mean it is now possible to lock the carrier waves of two (or more) transmitters in phase using GPS satellite signals (as used by in-car satellite navigation) thereby eliminating the problems and allowing coverage of a larger geographical area using a single frequency.

This is claimed to reduce the distortions normally experienced in the overlap zones to levels that are not significantly worse than the normal multipath effects that occur in the general reception of FM transmissions within built up areas.

It would be subject to some preliminary technical trials, but may well be worth further investigation and assessment, as it could provide a route toward additional programme channels, should the BFBS frequencies be unavailable.

The existing network could be specifically modified to operate in this single frequency mode, although such a change would require an element of cost and regulatory co-ordination.

We must emphasise though that additional frequencies will always be the preferred option.

Appendix B

In addition to its FM frequencies, Radio Gibraltar currently broadcasts on one AM frequency, 1458 kHz. There is an unused allocation at 1089 kHz with an authorised power of 2kW. We believe consideration should be given to utilising this frequency for DRM transmissions.

The Digital Radio Mondiale (DRM) consortium was founded in 1998 and represents broadcasters, academic institutions, and manufacturers. Its purpose is to develop a non-proprietary technical standard for the replacement of analogue AM (Amplitude Modulation) radio with digital radio, known as DRM.

The International Telecommunications Union (ITU), International Electrotechnical Committee (IEC), and the European Telecommunications Standardisation Institute (ETSI) have all approved DRM broadcasts for frequencies below 30 MHz.

On medium wave (AM) a DRM broadcast can provide close to FM audio quality, in stereo. Such transmissions are currently being originated by broadcasters in Germany and the United Kingdom, primarily Deutsche Welle, RTL and BBC World Service. If Gibraltar were to explore this mode of transmission on 1089 kHz it could become a European leader.

Listeners would require new equipment, and one option would be to subsidise this in the same way that Sky accelerated the uptake of digital television in the UK by subsidising digiboxes; the cost of a DRM radio is far lower, and for the small user base in Gibraltar a subsidy could be viable.

Appendix C

Chromakey is a technique for mixing two images or frames together, in which a colour from one image is made transparent, revealing another image behind it.

This technique is also referred to as colour keying, colour-separation overlay (CSO, a term favoured by the BBC) greenscreen, and bluescreen. It is commonly used for weather forecasts, where the presenter appears to be standing in front of a large map, but in reality is in front of a blue or green background.

Taking the case of a green screen, if the presenter wears any item of green clothing or accessories, the green becomes transparent and the map will show through. In the past the green leaf of the British Remembrance Day poppies has caused this problem, and presenters have had to appear *sans* leaf!

Blue and green are the colours used for the screen as they are the least similar to skin tone; if red were used the colour of the face would be incorrect.

This technique is also much used in news and entertainment programmes. In this shot we see an actor standing in front of a green screen:



Here, the background and other artists have been keyed in:



<http://en.wikipedia.org/wiki/Image:Incrustation.jpg>