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THE MEDIA AMIDST THE ENTERPRISES, THE PUBLIC AND THE STATE. NEW CHALLENGES FOR RESEARCH

To study the media field today is urgent to adopt a multi-focal approach capable of combining economic, sociological and political insights. The ambitious objective, besides the constant updating of research in each of the fields mentioned above, is to integrate the specific results into a coherent and unitary vision, for better knowledge of the relationships between the media industry, society, the State and the laws which govern them. Research on this level is able to provide the knowledge necessary for identifying emerging problems, orienting the interventions of the State and of international organisms in favour of pre-eminent collective interests, and to check the validity of the instruments adopted and the results obtained each time.

Keywords: media research, political economy of communication, audience fragmentation.

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1. Introduction

The media are complex to study because they are composed of diverse elements which constitute both their content and their containers, i.e. the information and the means of transmitting it. Their characters and functioning are an important field of study because the media are becoming increasingly important in the structure and evolution of society. They have an impact on the functioning of democracy and public institutions, on individuals' work and living conditions, on the construction of identity, on the inclusion and the social participation of every citizen in his or her own community of reference, and on the inequalities and the imbalances of its components.

The study of the relations between media and society has a long tradition and has provided social forces, their political expressions and States with keys for the interpretation and orientation of regulatory activities and the promotion of reform. Research in this field, however, is constantly being confronted with a spiral as the media system changes continually due to orientations and rhythms that are principally determined by the evolution of social relations (political, economic or cultural). The media in turn exercise a growing influence on the evolution of social relations and on the social ties of a large number of individuals, to the point of becoming, in many cases, a fundamental element of the same. A way to study some important aspects of this spiral is by analyzing the interactions between the media industry, the access to and the consumption of its products and services and the guidelines and regulatory interventions of the State and public institutions.

2. Contents and containers: a single product

The term *media* refers to a sector of activity made up of two distinct components, which can be managed by different subjects but are functionally integrated. On one hand, these activities are designed to create information contents; on the other, their purpose is the transfer of content in time and space. Central to the first component is an immaterial activity: the creation of content which varies by type of expression, by intellectual and creative complexity or by function (information, education, entertainment, etc.). The life of these products is determined by two types of incorporated values: the economic and the cultural. At the center of the second component lies a typically material activity: the creation of sup-

ports and networks for transmission and distribution. This is significantly influenced by technological development. In many cases the supports and networks also have other economic functions that can be distinguished from the media (the telephone, video-controlling, tele-surveys, etc.). The two components, both the content and the container, have distinct financial-productive characteristics and functions, which are in constant evolution and which also influence each other, but have to be presented in an integrated manner, so as to constitute a single product/service at the moment the consumer goes to use them.

3. The shifting media context

The relationships between the media and society and all attempts to analyze them are rendered more complex by a series of phenomena which have acquired considerable importance over the two last decades. The internationalization of the economy, of politics and of culture is changing the traditional set-up of governments in many countries (Grandinetti & Rullani 1996; Hirsch 1995). The growing mobility of people, products and capital is revolutionizing the traditional areas of consumption, culture and territory. Moreover, mass migration has altered the traditional instruments for social sharing, cohesion and participation, along with the identity factors of whole communities (Urry 2000). The shift in economic balance towards the East and the growing role of countries such as China and India in the global economy are displacing traditional international patterns for the consumption of raw materials and energy, for industrial production and mass consumption (Rampini 2006; Weber 2005). A new scenario characterized by new opportunities and risks (new markets, new competitors), but equally by new functions (multiculturalism, sharing, identity, citizenship, public sphere) and new restrictions (censorship, dependency and control) is opening to the media, implying further mutations. These evolutions directly influence not only the dynamics within the field of the media, such as accelerated processes of concentration, growth, multimedia diversification, and internalization (Croteau & Hoynes 2001; Herman & McChesney 1998), but also the normative activity of regulation and steering. This, both at the level of single States and of the international organizations, from the European Union to the International Telecommunication Union, from the World Trade Organization to Unesco, has acquired unprecedented importance for both containers and contents in recent years. (Zhenzhi 2003; Siocru & Girard 2002).

4. Three major interacting issues

This outline is sufficient to show the renewed relevance of research into the evolution of the relationships between the media system and the social system, and in particular, the relationships between processes of production, distribution and consumption of media, the processes of reproduction and transformation of social relationships and the role of the State. A significant contribution to the analysis and the criticism of these relationships is offered by the field of studies called *Political Economy of Communication* which has, since the 70s, occupied a place of prime importance on the international scene (Garnham 1979; Graham 2006; Mosco 1996; Murdock & Golding, 1991), to which I have been able to contribute on various occasions (amongst others: Richeri 1980, 1985, 1986a, 1986b, 1987, 1988, 1990, 2004, 2006). Attention is concentrated on three major issues; these interact constantly with each other and should therefore not be considered just as single elements, but, as far as possible, as mutual influences.

The first issue is the behavior of enterprises. Here interest lies especially in studying the evolution of the structure of media ownership, the characteristics of the markets in which the media operate and how these relate to their production and distribution choices. It is, in fact, important to highlight how financial organization acts on the creation and circulation of contents, of their meanings, and on audience composition. The second issue concerns the conditions of media access and the processes of media consumption to show which power relations condition them, how these factors change according to differences and social inequalities, and how these conditions determine the public's "work of consuming" contents (Cesareo 1978). The third concerns the State and the institutions which regulate and support both media enterprises (containers and contents) and the public, in order to understand how collective interests can be guaranteed in line with the principles of democracy.

5. Larger and more complex domain of research

At the turn of the millennium, four great, often interconnected, tendencies in the media industry have become incontrovertibly evident. These are changing the general panorama of the field, shifting the traditional reference points of research towards a larger and more complex domain. The first tendency concerns company size. The constant growth of the

media market corresponds to a constant *growth* in the size of enterprises through an intense flurry of acquisition and mergers, leading to the formation of some large groups capable of exercising great influence on domestic and international markets. This phenomenon, present in all developed countries, has assumed emblematic dimensions in the United States since the 1990s, starting from the merger of Time Inc. and Warner Communication for the price of 14 billion US dollars, and ending in 2000 with the merger of America On Line and Time Warner, for the price of 166 billion dollars. During that decade, all major North-American, European and Japanese groups were engaged in acquisition and merger operations, from Bertelsmann (De) to News Corp. (UK-USA), from Sony (Japan) to Time Warner (USA), from Mediaset to Reed International (U.K.), from Viacom (USA) to Vivendi (Fr), and from Walt Disney (USA) to Hachette (Fr), to quote the best-known names, to which dozens of other companies must be added (Gershon 2003; Musso 2000). The growth was the result of various forms of *integration* into the same enterprise of a series of activities once carried out by suppliers or clients (upstream or downstream vertical integration), by competitors (horizontal integration) and of activities in other media sectors (transversal integration). This has led to the formation of companies, which, on the one hand, are able to control the whole production and distribution channel of a single sector of activity, and, on the other, simultaneously operate in various sectors of the media, from press publishing to radio, from television to cinema, from music to the Internet, with considerable advantages in terms of economies of scale, goals and synergies (Doyle 2002a; Hoskins et al. 1997; Kunz 2007). The integration of content production by enterprises operating in the field of containers also pertains to this phenomenon. The most common case is that of telecommunication companies, such as Telefonica (Sp), British Telecom, Telecom Italia, AT&T (USA), which have integrated activities in the radio-television field. The growth and multimedia integration of activities reinforce the tendency towards international markets, already significantly present in some sectors of the media like the music and audiovisual industries (Aris & Bughin 2005; Miller et al. 2001). The tendency towards *globalization* is enhanced by the contextual process, which more generally concerns the economy and finance, but especially by content production where investment is concentrated in fixed costs (prototype) rather than variable costs (transmission and distribution), a phenomenon which puts distribution activities under notable pressure (Comor 1994; Albarran &

Mierzejewska 2004). The fourth tendency concerns the progressive concentration of the media markets on local, national and international levels. This tendency is present in nearly all media sectors and has been noticed in successive phases, in various national contexts (Doyle 2002; Compaine & Gomery 2000; Perrucci & Richeri 2004). On an international scale, the two sectors in which concentration has attained the most noticeable levels are the music industry, where nearly 70% of the global market is controlled by 4 large enterprises (the Americans Warner and Universal, the British Emi, and the Japanese-German Sony-BMG), and the movie industry, where nearly 65% of the world market is controlled by a small group of enterprises concentrated in Hollywood (Burkart & McCourt 2006; Miller et al. 2001; Wasako 2003).

In this situation of great evolution of the media industry, it is necessary to understand how the forms of production control, formatting, and diffusion of information, knowledge and culture change. It is necessary to understand how the formation of large global groups transforms international relations between populations, places, cultures and media consumption.

6. Selected media access and the *information poors*

The social importance of the media can be attributed to various elements. Amongst the most evident is the fact that, at mass level, selection of and access to information, knowledge and entertainment depends on the media. The second element is that the media are instruments which are increasingly important in the organization of social relations and work. The third element concerns the role the media play in the relationship between the citizen and public institutions, and between the consumer and the market. In order to access the media, some prerequisites are nonetheless needed. These prerequisites are not distributed amongst people uniformly, even in more advanced societies. In at least three cases this can easily be observed :

- a) to use a country's radio or television, it is necessary to know the national language; to read a newspaper, it is not only necessary to know the language but also to be literate, and in order to use the Internet as an access channel to the media, it is necessary to know the language, be literate and have technical skills;
- b) in order to use some media, one needs a connection to the content distribution network or the hardware necessary to extract it from its sup-

port. If the coaxial cable or the optical fibers do not come to one's home, or if the Hertzian network does not cover where one lives, access to contents transmitted or on demand through the network is excluded. The same applies in the case of music and home video if one does not have the appropriate hardware.

c) the third prerequisite concerns the financial resources necessary for connection to the network, for purchase of the hardware (satellite dish, TV, video recorder, etc.) and of the contents (pay-TV, media on demand, newspapers, books, records, etc.).

These are problems which penalize the great majority of the population in disadvantaged countries, and which have not been satisfactorily solved in advanced countries. A smaller but nonetheless consistent part of the population of these countries, from "new illiterates" to migrants, from low-income groups to the inhabitants of poor or marginal urban and rural areas, experiences difficulty accessing a range of media.

The *Information poor* also constitute an important problem in advanced countries if one considers the fact that in many countries the following are increasing:

- the number of migrants, while the number of "new illiterates" is not decreasing;
- the social group considered poor;
- the percentage of medium- and high-level programs which are changing from free to fee-paying (pay TV, media on demand, etc.);
- the number of platforms, of channels and supports (from digital TV to mobile TV, to IPTV, I-pod, etc.) and opportunities to access contents for those who have the necessary requisites and the skills, excluding the others.

One example is the number of people who risk marginalization or exclusion from access to informative, cultural and entertainment Internet contents, in other words the *digital divide*, in one of the most developed areas of the World. According to Eurostat data, referring to 2004:

- 53% of the inhabitants of the 25 countries of the European Union, aged between 16 and 74 years, do not use the Internet,
- fewer than half of EU inhabitants (43%) have an Internet connection at home
- 25% of young people aged between 16 and 24 have never used the Internet, but this percentage corresponds to more than half (57%) of the population aged 45 to 54

- 75% of people with a low level of education (primary and secondary schools) do not use the Internet
- 62% of Europeans living in sparsely inhabited areas do not use the Internet

The exponential growth in media offerings amplifies another factor of social disruption which derives from the way the media are used to access information, knowledge, and culture. Media consumption is socially conditioned because it comprises an activity or “work,” based, amongst other things, on the attitudes and skills of an individual (Bourdieu 1979), which are, to a large extent, socially determined. It is moreover oriented by stimuli and opportunities for “investing” the information and cultural capital acquired through the media, which depends on one’s professional field.

7. Fields of State intervention

In all democratic countries, the State, recognizing the social relevance of the media, intervenes in various ways. The intention is to ensure that the media industry may grow, compete and distribute its products, that entrepreneurial activities take place in the public’s interest and in respect for pluralism and independence of information, and that access to media and freedom of information are guaranteed. These objectives should constantly be compared against entrepreneurial and social evolutions. The transformations taking place demand constant modification of public interventions concerning ownership and market concentration, the origin and variety of content, forms of access, and the protection and support of the industry.

Considering the on-going concentration processes, the State should update its regulation instruments in two areas in particular. The first one concerns the ownership of media and its influence on contents, since the concentration of ownership can lead to abuses in the financial and political fields. The other is market concentration, which can limit pluralism of information, of viewpoints, of cultural types and expressions. In the transformation of the media landscape, there is also a third area of public intervention to consider, namely the forms of direct and indirect support for the media industry (audiovisual, daily, periodical and book publishing, etc.), which in many, mainly European countries help and guide the development of national enterprises. One example is the activity of

the European Union as regards both regulation and support of the development of the European media industry. From 1989-1990 until now, both the Directive *Television without borders* and *Programme Media* have had to be updated on various occasions in order to respond to changes taking place in individual member States as well as on an international scale. A fourth type of public intervention aims at improving conditions of media access, which, in several countries, particularly concern the periodic press and book publishing, audiovisual media and, most of all, distribution networks and reception equipment.

The intervention of the State, with its constant modifications, is nonetheless an important field of analysis in that steering it demands continuous revision of viewpoints and data, and the quality of the initiatives and the efficiency of the results obtained are not always guaranteed. Among the various aspects most frequently mentioned by critical research is that a great number of the legislative interventions concentrate on financial aspects, in particular on the objective of guaranteeing competition between enterprises. This often leads to unsatisfactory results if one considers the data on the levels of national and local concentration reached in many countries in terms of the print press and radio-television and, internationally, as already mentioned, in terms of recorded music and the cinema.

The measures designed to control concentration, based upon the right to competition and the right of the media, are often revealed as complicated, insufficient and inefficient (Meier 2005). The media's internalization process complicates the situation, as only large national companies in each country are able to protect the domestic market from large international groups and to compete with them on the international market.

8. Media choice and audience fragmentation

In the European tradition in particular, the State also enters the media field directly, by means of its own activity in the radio-television field. This is to reduce the market distortions in a sector which is considered important for public interest in many countries, not only in Europe. Pluralism, variety and quality of contents that public television has to guarantee institutionally, together with "universal service", are objectives which appear ever more difficult to reach in the face of increasing infrastructural and content costs, the multiplication of technological and broadcasting platforms, the fragmentation of the public and the creation of powerful private televisions that compete in the quest for audience.

From the European point of view, the crisis of state radio-television enterprises is increasingly obvious. It is a complex crisis concerning at least three of the aspects under discussion: the legitimacy of public intervention in this sector, the distinctive identity of state radio-television broadcasters and the ways their activities are financed.

The proposal to privatize public broadcasting companies re-emerges periodically in various countries. Indeed, their programs in many countries are accused of copying those of the private sector too often, guided exclusively by commercial interests, and their costs are constantly rising, whereas their sources of financing, be they from advertising or taxes, are often an object of controversy. In any case, their image has deteriorated to such a degree that they are sometimes represented as old wrecks, subject to political power and incapable of renewing themselves, or even useless. Even though they still are at the center of the information and entertainment system in many cases, they absorb important financial resources, taking them from private enterprises which are sometimes more dynamic, efficient and independent from political influences.

The interest in reflecting on the role of the State in the field of television does not only derive from the public sector's present state of crisis. The path towards the "all digital", which European countries have taken in a more or less rapid and linear manner, leads to a substantial transformation of the field of television. The multiplication of channels means, on one hand, an increase in the overall quantity of programs broadcast in each country and, on the other, a progressive fragmentation of the audience between a considerably higher number of channels than the 5-6 traditional, national and "general" channels. One can think of "multi-channel" homes where the state television audience has noticeably diminished in favor of a multiplicity of national and international channels, more or less specialized, each of them gathering much smaller fractions of the public (Richeri 2004).

The perspective which public broadcasters have to face is summarized in a British Broadcasting Corporation document:

The explosion of media choice is causing audience viewing and listening to fragment. People are consuming a wider range of services across a greater range of device. As a result, we are now in a multi-track media society, in which no two people's media behaviour is the same (BBC 2004).

This has significant consequences on the functions of television in general, and, in particular, on some principles which are traditionally behind public television, such as universality of service, collective interest, mandatory financing by all television viewing families, etc.

9. Conclusion

The field in question is large and marked, as we have seen, by profound evolution, on the local, national and international levels. In order to comprehend the phenomenon, its roots and perspectives in all their complexity, it appears ever more urgent to adopt a multi-focal approach capable of combining economic, sociological and political insights. The ambitious objective, besides the constant updating of research in each of the fields mentioned above, is to integrate the specific results into a coherent and unitary vision, for better knowledge of the relationships between the media industry, society, the State and the laws which govern them.

Research on this level is able to provide the knowledge necessary for identifying emerging problems, directing the interventions of the State and of international organisms in favour of pre-eminent collective interests, and to check the validity of the instruments adopted and the results obtained each time.

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