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an der Universität zu Köln**

Manfred Kops

**Globalising Media Markets.  
Benefits and Costs, Winners and Losers**

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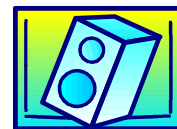
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# Globalising Media Markets. Benefits and Costs, Winners and Losers<sup>\*</sup>

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Manfred Kops

## **Globalising Media Markets? Benefits and Costs, Winners and Losers**

### **Abstract**

Globalisation increases the efficiency of media production. This benefits media companies, the consumers (viewers, listeners, and readers) of media products, and the states in which media companies reside. On the other hand, it intensifies economic pressure to provide mainstream programming and it reduces the diversity of media content. This disadvantages minorities by diminishing their opportunities to participate in national and international public communication and, in turn, reduces the coherence and flexibility of nations while increasing the risk that communities and nations which feel excluded from public discourse lose the ability to influence public decisions and to accept the results of public decision making.

This silencing of minority voices and weakening of their communal fabric may lead to separatism, and even terrorism. Preventing this requires broad and inclusive public communication, among communities and minorities within states, and international dialogue among the nations of the world. This can be achieved in two ways: by regulating to mitigate the harsh economic rules of media markets and by strengthening the voice of non-commercial media, such as public service broadcasting, community broadcasting and non-commercial online services.

Also new digital services (like websites provided by individuals or non-profit organisations, web-locks, and electronic newspapers) that can be produced and distributed with low costs may increase the variety of media content, and thus may counteract the negative consequences of mainstream programming. On the other side, also these new digital services are exposed to the economic rules; and after an initial period of high intrinsic motivation, many of these new services disappear or become mainstream-oriented, too. Thus also for them regulations that mitigate the economic rules or strengthen a non-commercial provision are appropriate.

### **Key Words**

// Globalisation / Media Markets / Public Communication / Media Regulation / International Media Policy /



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## **Globalising Media Markets. Benefits and Costs, Winners and Losers**

### **1. Globalisation of Media Markets: Higher Efficiency – Higher Welfare**

In economic terms, globalisation is the (spatial) expansion of markets, the transformation of small, local, regional, or national markets into supra-national, and preferably worldwide markets. New technologies, coupled with institutional and political change, provided the impetus for globalisation. On the media markets it is especially accelerated by the digitalisation of the production and distribution of audiovisual goods.<sup>1</sup>

This market expansion optimises media output by decreasing the minimum average cost of media products (e.g. per newspaper copy or per TV programme hour/viewer), thus raising both surpluses for media consumers and profits for media companies. Successfully globalised media companies also create higher turnovers, higher profits and new jobs in their home countries.<sup>2</sup>

From this perspective, globalisation is a positive and legitimate strategy which benefits media companies and their customers. Promoters of free trade, like the World Trade Organisation (WTO), therefore evaluate globalisation of media industries positively. They support attempts to treat the audiovisual industry like other industries by subjecting them to WTO rules for the protection and expansion of worldwide free trade: the “General Agreement on Tariffs and Trade” (GAT), the “General Agreement on Trade in Services” (GATS) and the “Agreement on Trade-Related Aspects of Intellectual Property Rights” (TRIPS).<sup>3</sup>

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<sup>1</sup> This definition characterises globalisation by means of economic criteria, and it thus differs from more general definitions that are common in the literature. For HACHTEN (2003, p. 265), for instance, “the term globalization is an inexact expression for a wide array of worldwide changes in politics, communications, business and trade, lifestyles, and culture.” For other definitions, and for the effects of globalisation on the media, see e. g. ACHESON 2003, HALLIN/MANCINI 2004.

<sup>2</sup> For a theoretical economic underpinning see HOSKINS/McFADYEN/FINN 2004, especially chapter 13. -- The distribution of these advantages between producers and consumers depends on the consumers’ preferences, the degree of competitiveness in the different markets, and the protection of property rights (see e. g. GRANT/WOOD 2004, pp. 80 ff.). Media products that are unique in the eyes of the consumers, as the books and films about Harry Potter, for instance, generate high earnings for the copyright owners, in this case for Joanne K. Rowling (whose earnings exceeded one billion Euro already in 2004, before the fifth of the Harry Potter books was published and the third of the films was released, see [http://www.forbes.com/2004/02/26/cx\\_jw\\_0226rowlingbill04.html](http://www.forbes.com/2004/02/26/cx_jw_0226rowlingbill04.html)). In contrast, for media products, for which there are close substitutes or copyrights are not protected, the advantages of high circulation mainly go to the consumers.

<sup>3</sup> For the media policy of the WTO in general, and for the media rules of the GATS see: BEVIGLIA-ZAMPETTI 2005, GUERRIERI/IAPADRE/KOOPMANN 2005.



With regard to the expansion of the media industry, both in absolute figures and as shares of the national products of almost all countries, especially the developing ones, this is a strong argument.<sup>4</sup> Many governments therefore support their national audiovisual industries, but in general, they also try to protect them from international competition.<sup>5</sup>

The economic potential of the media results from an economic peculiarity known as the non-rivalry of consumption. If we disregard the variable costs to store and distribute content, which have been greatly reduced by digitalisation, we can see that this phenomenon is responsible for remarkable reductions in unit costs. Once a master copy exists, there are few or no additional costs to supply the product to additional users. For programme producers and broadcasters, this property includes the risk that high first-copy costs cannot be refinanced if the audience of a programme is too small; but it also includes the chance of high profits, once a programme has passed the break-even number of viewers.

Table 1:  
Non-Rivalry of Consumption of TV Programmes:  
Globalisation Decreases Costs per Viewer and Increases Profits

TV Programme	Audience (in Mill)	Total Costs (in Mill \$)	Costs per Viewer (in \$)	Revenues per Viewer (in \$)	Net Benefit per Viewer (in \$)	Total Net Benefit (in Mill \$)
1	2	3	4	5	6	7
A	1	4	4,00	1,00	-3,00	-3
B	2	4	2,00	1,00	-1,00	-2
C	4	4	1,00	1,00	0,00	0
D	10	4	0,40	1,00	0,60	6
F	20	4	0,20	1,00	0,80	16
G	100	4	0,04	1,00	0,96	96

Table 1 illustrates this through a fictitious example: If the production of a TV programme costs \$4 million, the cost per viewer is \$4.00 if one million viewers watch the programme. With two million viewers, the cost per viewer is \$2.00; with four million viewers it is \$1.00; and with ten million viewers it is \$0.40, etc. If revenues per viewer (either from pay TV or from commercials) are \$1.00, a company will lose \$3 million if only one million viewers watch the programme; with two million viewers, it will still lose \$2 million. But if the break-even point with four million users is exceeded (with no losses and no profit), the profit increases progressively: e.g. it is \$6 million with ten million viewers, \$16 million with 20 million viewers, and \$96 million with 100 million viewers.

<sup>4</sup> For a description and forecast of the economic importance of 14 entertainment and media segments see PRICEWATERHOUSECOOPERS 2005.

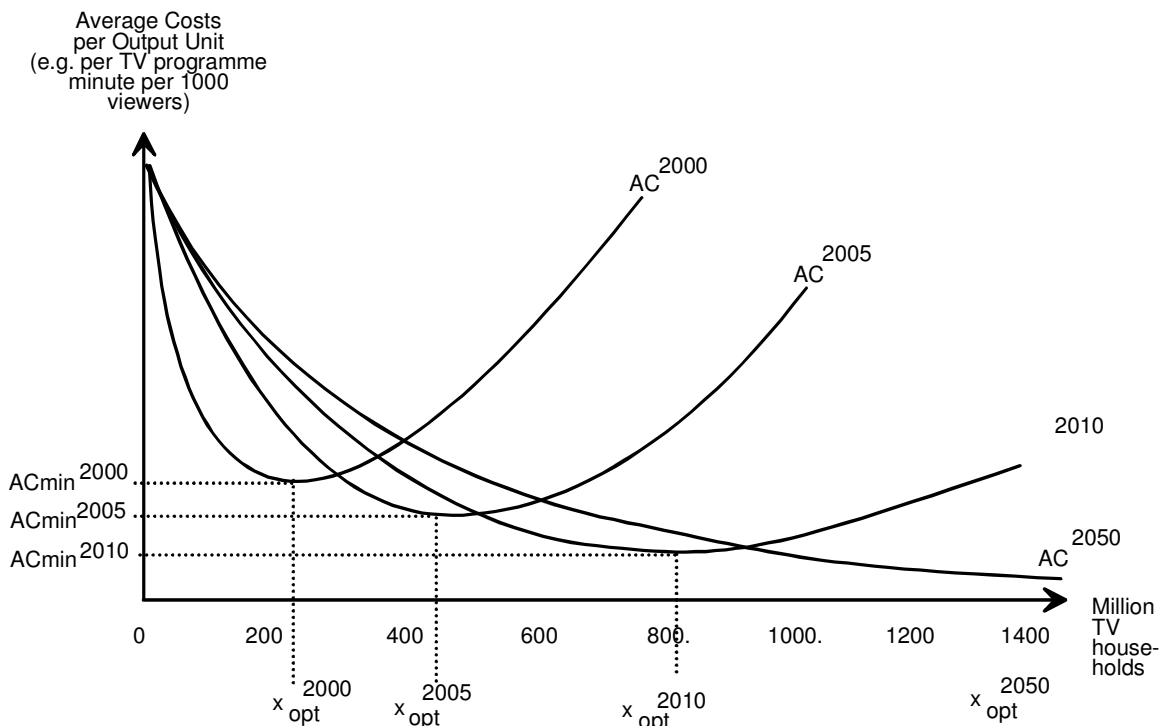
<sup>5</sup> For an overview of the national media policies of selected European countries see for instance GUERRIERI/IAPADRE/KOOPMANN 2005; OPEN SOCIETY INSTITUTE 2005.



## 2. Globalisation of Media Markets: More Market Power and More (Uncontrolled) Political Power

The economic peculiarity of non-rivalry of consumption explains, why media products become cheaper per unit and more competitive when markets expand in the course of globalisation. This benefits media companies, but also viewers and listeners and readers, who *ceteris paribus* have to pay lower subscription fees or less attention to advertisements.<sup>6</sup> On the other hand, it also explains that the increasing output sizes of the media companies lead to a reduction of the number of media companies: Fewer companies produce larger outputs (more newspaper copies, more TV programme minutes, more page impressions etc.).<sup>7</sup>

Figure 1:  
Increasing Outputs, Decreasing Average Costs, and Media Concentration  
as Results of the Digitalisation and Globalisation of Broadcasting



<sup>6</sup> If there is no competition that forces the companies to pass the benefits from cost reductions to its viewers and listeners, the subscriptions or/and the amount of advertisements remain on the former level and globalisation only will increase the companies profits (see footnote 2, p. 5). If in the course of globalisation the number of companies decreases and its market power grows, subscriptions and advertisements even can expand to the disadvantage of the viewers and listeners. See TIROLE 1989.

<sup>7</sup> In most countries a concentration of media ownership can be observed (see for instance MOTTA/POLO 1997; with focus on trans-national media concentration in Europe see COUNCIL OF EUROPE 2004).



With the cost functions assumed in figure 1, for a TV-soap for instance, the optimal output would be about 230 million TV households in the year 2000. If the total world market for a TV-soap consisted of one billion TV households, more than four broadcasters could share this market.<sup>8</sup> In the course of a technically and economically driven globalisation, the cost function in 2005 would have altered, with lower average costs and a larger size of the optimal output (of then about 450 million TV households); in 2005, fewer than three broadcasters would remain in the market (instead of more than four in the year 2000); and in 2010, with even lower average costs and an even larger optimal output size (of 800 million TV households), almost only one (monopolistic) broadcaster could serve the whole market. (For 2050 we assume unrealistically and, only for didactic reasons, that the costs per unit fall continuously, i.e. that there only are fixed costs (for production), but no variable costs (for storage and distribution).

As in other industries, such concentration has disadvantages for consumers. Oligopolistic and monopolistic corporations can abuse their market power, as the competition among suppliers is weaker than in perfect markets. This can lead to higher prices and/or lower quality for media consumers. Furthermore, and differently from other industries, its economic power can translate into editorial and political power – with additional and negative consequences: Monopolistic media companies can push imbalanced and biased opinions and coverage to further their own agendas and to influence public attitudes, especially in the political arena. They thus are a central actor in the political system (both in democracies and in authoritarian states). In spite of this central role, most countries do not exercise public control over media companies, though, but treat them like entities that sell cars, steel or clothing.<sup>9</sup>

As globalisation promotes substantial media concentration, it also increases these problems of the uncontrolled, and often hidden, public and political influence of global media companies. Therefore, there is a need to strengthen the instruments to control and to prevent media concentration. If a weak competition policy fails, or if it intentionally accepts the great market power of a domestic media company in order to benefit from the above-mentioned advantages (efficiency, higher competitiveness and more jobs), these media companies should at least be publicly controlled (e.g. by reporting duties, transparency of ownership, prohibition of political sponsoring, etc.).<sup>10</sup> Achieving this will require both national and international regulatory regimes.<sup>11</sup> The internationalisation of the companies' activities will also require a significant increase in regulatory

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<sup>8</sup> The shape of the cost functions (and as a consequence: the number of suppliers) differs between countries (e. g. large versus small countries or English speaking versus non-English speaking countries) and between media products (e. g. broadcasting programmes versus search engines). The functions assumed in figure 1 for the market of US-TV soaps, however, correspondent pretty well with the “5 companies = 80 % content”, mentioned e. g. by HATCH 2003, p. 847.

<sup>9</sup> McCHESENEY 1999, pp. 311seq.; McCHESENEY/NICHOLS 2002, pp. 81seq.

<sup>10</sup> See EUROPEAN AUDIOVISUAL OBSERVATORY 2001, DEIDRE et al 2004.

<sup>11</sup> See ACHESON/MAULE 1996; KOPS 2000, p. 252seq.

competence. In the European Community, this process of re-examining and re-adjusting regulatory competences for the media is in full swing.<sup>12</sup>

### 3. Globalisation of Media Markets – Reduced Diversity

There is another important economic factor that drives media companies to focus on “mainstream” content. Even if the drive towards concentration can be restricted by a suitable competition policy, and regardless of the structure (monopolistic or atomistic) of the industry or the size of the companies involved, the unit cost of minority content is always higher. The economies of scale are so great (due to the previously evoked non-rivalry of consumption of media) that it is impossible for minority content designed for small audiences to compete with mainstream programming. This is true even if minorities are willing to pay more for their own programming.<sup>13</sup>

Table 2 illustrates this: Minority content (e. g. a TV report about a local event) with an audience of one million viewers is crowded out by mainstream content (e. g. an international soccer game) with an audience of ten million viewers, even if the willingness to pay for the local report with \$1.00 (column 5) exceeds the willingness to pay for the soccer game (\$0.50), and even if the total production costs of the minority content (\$0.4 million, column 3) are only 10 % of the costs of the mainstream content (\$4 million). Under these circumstances, mainstream content would be preferred for each available programming slot, as it would generate more profit (\$1 million, column 7) than minority content (\$0.6 million).

Table 2:  
Mainstream Programming as an Economic Rationale of the Media Industry

	Audience (in Mill)	Total Costs (in Mill \$)	Costs per Viewer (in \$)	Rev. per Viewer (in \$)	Net Benefit per Viewer (in \$)	Total Net Benefit (in Mill \$)
1	2	3	4	5	6	7
Mainstream Content	10	4,0	0,40	0,50	0,10	1,00
Minority Content	1	0,4	0,40	1,00	0,60	0,60

<sup>12</sup> There are several regimes involved into this process, e. g. the amendment of the Television Without Frontiers Directive (see below), the expansion of competences of the European Commission to control and eventually prohibit media concentration, the European policy in the WTO-negotiations, and the attempts of the European Commission (especially the directorate for competition policy) to control the performance and funding of the national public service broadcasters.

<sup>13</sup> This trend to provide “more of the same” has been proved formally by models of the so called TV-economics (e. g. see HOTELLING 1929, STEINER 1952, SPENCE/OWEN 1977, OWEN/BEEBE/MANNING 1974; OWEN/WILDMAN 1992) and it is meanwhile described in most textbooks on media economics (see e. g. HOSKINS/McFADYEN/FINN 2004). For the social, cultural and political consequences of this peculiarity see GRANT/WOOD 2004, HELM et al 2005, CROTEAU/HOYNES 2006.



Globalisation intensifies this inherent tendency towards “more of the same”. When media markets expand, audiences for programming that was already popular in smaller regional and national markets tend to increase: Sporting events, TV movies, popular daily soaps, or international pop music. In contrast, programmes that appeal only to minorities within regional and national markets, such as reports about local events, regional or national cultures, or programmes in local or regional dialects and locations, are unlikely to reach broader audiences even when they are more widely available in globalised markets.

Table 3:  
Intensified Mainstream Programming  
as Consequence of the Globalisation of Media Markets

BG = before Globalisation AG = after Globalisation	Audience (in Mill)	Total Costs (in Mill \$)	Costs per Viewer (in \$)	Rev. per Viewer (in \$)	Net Benefit per Viewer (in \$)	Total Net Benefit (in Mill \$)	First Mino- rity Progr. (Rank)
1	2	3	4	5	6	7	8
Mainstream Content BG	10	4,0	0,40	0,50	0,10	1,00	1,7
Minority Content BG	1	0,4	0,40	1,00	0,60	0,60	
Mainstream Content AG	100	8,0	0,08	0,50	0,42	42,00	4,6
Minority Content AG	10	0,8	0,08	1,00	0,92	9,20	

Table 3 illustrates this. If we assume that in the course of globalisation the audience for mainstream content (let us take soccer as example again) increases from 10 million to 100 million viewers, and the audience for minority content (a local report) increases from 1 million to 10 million viewers (see column 2), the large economies of scale for the soccer match lead to a substantial increase in the broadcasters’ total net benefit or profit (from \$1 million to \$42 million), whereas the profit for the minority programme only rises from \$0.6 million to \$9.2 million (see column 7). Globalisation thus reinforces the profitability of the mainstream programme compared to the minority programme. “More of the same” (soccer) becomes even more profitable: Whereas the ratio  $r$  before globalisation is  $1,00:0,60 = 1,7$  (see column 8), it has become  $42,00:9,20 = 4,6$  after globalisation. I.e. whereas it does not make sense before globalisation to split the soccer audience by broadcasting more than one soccer game ( $r = 1,7 < 2$ ), it now becomes profitable: Even if the audience for soccer matches is split up into four smaller audiences, each of the four soccer events generates higher total profits than the local report (as  $r = 4,6 > 4$ ). Thus, in the course of globalisation there will be more of the same (here: soccer matches) and minority programmes will fall further down in the economic and programming priorities of commercial broadcasters.

The example can be transferred to other contents. Also for different forms of music, political, religious, cultural programmes etc. globalisation *ceteris paribus*<sup>14</sup> intensifies the tendency to produce more of the same and to reduce diversity.

<sup>14</sup> The *ceteris paribus* clause in this regard refers first and foremost to the technology used to produce and distribute the media products and to the behaviour and the

#### **4. Reduced Diversity of Media Markets Jeopardizes Public Communication Within Nations**

The diminishing diversity of the media markets has negative effects for public communication, both within and among nations. Within the national framework, reduced diversity means minorities have fewer opportunities to articulate their preferences and attitudes. Public discourse becomes increasingly dominated by mainstream thinking and by persons and communities that favour it. This can endanger the nations' fairness, coherence and stability, especially if the national communities are segmented into sub-communities, e.g. by race, religion, ethnicity or income.<sup>15</sup>

Diminishing diversity of the media also reduces a nation's flexibility to adapt to changing conditions. Just as biodiversity is a central precondition for biota to adapt to a changing environment,<sup>16</sup> the diversity of attitudes, proposals, arguments, and discussants is a central precondition for a society's capability to find appropriate and consensual solutions for common decisions that become necessary as the economic, political, social, cultural, or institutional framework of a nation changes. Open, fair and diverse public communication, first and foremost through the mass media, is an important precondition to ensure that all possible solutions are articulated and discussed, that the best solutions are chosen in time, and that all groups of society accept these decisions.<sup>17</sup>

From this perspective, reduced diversity is to the disadvantage of all members of the national community. However, the disadvantages are not evenly distributed. Whereas minority voices have few opportunities to be heard, mainstream attitudes gain an even more prominent position. For members of mainstream communities (e. g. of the largest racial, religious, ethnic, or political communities) it then becomes even easier to argue and entrench their positions; for members of minorities it becomes even less possible to influence public discourse. The same is true with regard to the special size of a nation's sub-communities, e.g. in a federal system: The local authorities and citizens of large regions and states gain additional influence, and the local authorities and citizens of small areas lose further influence and are increasingly marginalized.

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preferences of the users. If these factors are considered, other, perhaps overcompensating effects may overlap the consequences, which have been modelled in our fictitious examples. Digitalisation, for instance (as a form of technological change) has pushed globalisation (and thus has reduced variety of the media), but it also has created new forms to distribute content (e.g. the Internet), which increase variety. See chapter 7, below.

<sup>15</sup> Traditionally these problems have been discussed intensively in the literature under the label of "nation building" (e. g. by DEUTSCH 1963, for an actual publication in this context see TAYLOR 2000). New publications include PFETSCH/ESSER 2004, PFETSCH 2004, and ESSER/PFETSCH 2004).

<sup>16</sup> See WILSON 1992.

<sup>17</sup> See HAAS 2003; GLYNN/JEONG 2003, with further references.



For these reasons, it also is necessary to ensure that the chances to participate in public communication are not merely determined by the economic rationale of the market. Some NGOs have recognized this: The World Summits on the Information Society in Geneva in 2003 and in Tunis in 2005 were important platforms for articulated organized voices against the domination of market rules and commercial actors for public communication targets.<sup>18</sup> Similarly, UNESCO elaborated a Convention on the Protection and Promotion of the Diversity of Cultural Expressions (CCD),<sup>19</sup> intended to serve as a counterweight against the recent trends of commercialisation and globalisation of the media sector that was approved in October 2005.<sup>20</sup>

In general, there are two ways to ease market rules: The first is to institute public regulation of the private media companies. For instance, commercial broadcasters can be obliged to broadcast public-interest content which is not profitable (and thus would not be provided according to market rationale), but which increases programme variety, such as reserved time slots for certain local minorities, for small political parties, for disabled people, for ethnic or language minorities etc. They could also be obliged to provide certain special-interest content, such as local, religious or cultural programming. Also, precautions for open access to distribution channels (e. g. “must-carry” rules for TV cable networks) can weaken or abrogate the market logic and ensure that minorities preserve the necessary access to participate in public communication, even when globalisation intensifies economic forces.<sup>21</sup> -- However, as the regulation of private media offers opportunities to steer media content politically, one should take care that the regulators are politically independent. Experiences in many countries show that the media will be abused for biased political targets, if parliaments or even governments regulate the mass media. Several countries, therefore, have established politically independent authorities for media regulation.<sup>22</sup>

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<sup>18</sup> See <http://www.itu.int/wsis/>.

<sup>19</sup> [http://portal.unesco.org/culture/en/ev.php-URL\\_ID=11281&URL\\_DO=DO\\_TOPIC&URL\\_SECTION=201.html](http://portal.unesco.org/culture/en/ev.php-URL_ID=11281&URL_DO=DO_TOPIC&URL_SECTION=201.html); for a chronology of the UNESCO policy see STENOUE 2004.

<sup>20</sup> Only two countries – the United States and Israel – voted against it and four abstained, see [http://portal.unesco.org/culture/en/ev.php-URL\\_ID=29078&URL\\_DO=DO\\_TOPIC&URL\\_SECTION=201.html](http://portal.unesco.org/culture/en/ev.php-URL_ID=29078&URL_DO=DO_TOPIC&URL_SECTION=201.html).

<sup>21</sup> Canada is an illustrative example. Due to the similar language and the dominance of commercial broadcasters in the USA, Canadian broadcasters cannot compete with the US-American networks. The Canadian broadcasting policy therefore took regulatory remedies to enable its national broadcasters to provide Canadian content in its programmes. See the findings and recommendations in the second report of the standing Committee on the State of the Canadian Broadcasting System at [www.parl.gc.ca/InfoComDoc/37/2/HERI/Studies/Reports/herirp02/18-Ch17-e.htm#4](http://www.parl.gc.ca/InfoComDoc/37/2/HERI/Studies/Reports/herirp02/18-Ch17-e.htm#4). One of the measures taken was to exclude TV programmes from the GATS. By contrast the national TV industry in Mexico, where TV programmes were included into the GATS, nearly collapsed because of the dominance of US-American TV-programmes. See DORLAND 1996, ACHESON/MAULE 2005.

<sup>22</sup> For the European countries see MACHET 2002, EUROPEAN AUDIOVISUAL OBSERVATORY 2002, OPEN SOCIETY INSTITUTE 2005; for the CIS see McCOR-

A second way to release the media from economic forces and to ensure fair chances to publicly communicate is non-market financing. In this case the media companies do not necessarily maximise profit, but they can fulfil non-profit missions, as well as those that maximise the public interest.<sup>23</sup> Public service broadcasters are constructs of this kind. They are financed solely or dominantly by public revenues, e. g. by revenues from a receiver licence fee. They can be obliged to fulfil public purposes, as well as to provide a broad platform for public communication, including those groups that would be crowded out by economic rationales.<sup>24</sup> -- Similarly to the regulators of private media, the regulators of public service broadcasters should be politically independent, though, particularly in their programming decisions, and here especially with regard to political programming.

However, as both ways to ease the market rules conflict with the idea of free trade and are incompatible with many elements of the GATS, organisations like the WTO (but e. g. also many bureaucrats from the European commission, especially from the directorate for competition policy) criticise regulations and public funding of the media.<sup>25</sup> If they succeed, the most basic and fundamental audiovisual and cultural policies to protect and promote the diversity of cultural expressions are put at risk or even become illegal. The adoption of the UNESCO CCD has increased the likelihood that these attempts will fail.

### **5. Reduced Diversity of Media Markets Jeopardizes Public Communication Among Nations**

The economic rationale that substitutes regional content for local content and national content for regional content, also substitutes the national content of large nations for the national content of small nations. In the course of the globalisation of media markets, small and non-influential nations are therefore further crowded out of international public discourse, and their identities, topics, expectations, and demands are pushed off the international political agenda, as they are not interesting for large audiences and readerships, and as the media prefer other, more popular and more profitable content.

On the international level, such a reduction in diversity and intensification of mainstream programming has similar negative consequences for the public dia-

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MACK 1999, for an international overview see BLUMLER/NOSSITER 1991; SINCLAIR 2004, part IV; OPEN SOCIETY INSTITUTE 2005.

<sup>23</sup> KOPS 2005

<sup>24</sup> Ibid. Empirical results confirm this deduction. MCKINSEY, e. g., has demonstrated by international comparative studies (1999, 2004) that the programmes of public service broadcasters are more diverse than the programmes of commercial broadcasters. For the German broadcasters KRÜGER (e. g. 2005) and TREBBE (e. g. 2004) in several studies confirmed these findings. Similarly ROTH 2004 concluded in a study about the Dutch broadcasters that the diversity has decreased since commercial television has been introduced in the Netherlands.

<sup>25</sup> See WIEDEMANN 2005.



logue, for the coherence and stability of world society, and for small nations' willingness to participate in international regimes as described above for the national level: It reduces the international coherence and stability, and it reduces the chances of countries to learn from each other, to find out why they have done better (or worse) than others, and to find the path to progress, not just in economic terms but also with respect to other targets, e. g. the consolidation of democratic institutions and social justice.<sup>26</sup>

The two ways already mentioned to ease market rules with regard to protecting viable and diverse public communication on the national level also apply at the supra-national and international level: First, commercial broadcasters can be regulated, e.g. by obligations to broadcast certain content of international public interest which is not profitable (and thus would not be provided according to the market rationale).<sup>27</sup> The current absence of an enforceable international regulatory regime is a major reason for the lack of such international regulations for commercial broadcasters. As long as some nations do not agree on a universal regulatory regime and as long as some nations do not enforce one, broadcasters easily circumvent such rules, simply by changing countries. As long as nation-states resist subordinating their national powers to enforce international regimes, it is impossible to create them.<sup>28</sup>

The second way to release the media from economic forces and to ensure fair opportunities to participate in public communication, non-market financing, does present a possible solution at the supra-national and international level. However, here we have to distinguish between two forms of non-market financing: state financing and public service broadcasting. State financing of the media probably will not contribute to a greater diversity of the media. As only large and rich countries can afford state broadcasters with an international mission,<sup>29</sup> state-

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<sup>26</sup> See HARRISON 2000, p. 306; also SY 1999. -- The UNESCO continuously has stressed the importance of an "Intercultural Dialogue" and it has provided means to intensify it ([http://portal.unesco.org/culture/en/ev.php-URL\\_ID=11406&URL\\_DO=DO\\_TOPIC&URL\\_SECTION=201.html](http://portal.unesco.org/culture/en/ev.php-URL_ID=11406&URL_DO=DO_TOPIC&URL_SECTION=201.html)), also and especially for developing countries (see [http://portal.unesco.org/culture/en/ev.php-URL\\_ID=11407&URL\\_DO=DO\\_TOPIC&URL\\_SECTION=201.html](http://portal.unesco.org/culture/en/ev.php-URL_ID=11407&URL_DO=DO_TOPIC&URL_SECTION=201.html)).

<sup>27</sup> It should be borne in mind that in addition to local and regional communities, on the international level also small and non-influential nations are "spatial minorities". Programming slots for them could be made into obligations, similar to those suggested on the national level.

<sup>28</sup> This is a general problem for the provision of global public benefits (global public goods) and for the prevention of global public costs. See KAUL/GRUNBERG/STERN 1999, with regard to global civil society BENHABIB 2002; KEANE 2003, with regard to the Internet RIZZO 2003.

<sup>29</sup> SPANSWICK (2006, p. 20 seq.) mentions as international commercial Television news broadcasters that are dominantly state-funded: the Chinese channels CCTV-9 (in English) and CCTV E&F (in Spanish and French), Russia Today TV (since December 2005, 50% funded by the Russian Government and 50 % by commercial organisations), and Telesur (since November 2005, a collaborative venture between the governments of Cuba, Uruguay, Argentina and Venezuela). For a detailed list of broadcasters see AIB 2005 and IP 2005, although both sources do not permit a



financed international broadcasters would tend to increase the domination of large and rich countries in the commercial media order (not to mention the political bias that is intended and usually achieved by state funding, see SEMETKO 2003).

Public service financing, as the second form of non-market financing, could be the better alternative. However, here also the contribution to international public communication is small, in practice, in contrast to the considerable number of commercial broadcasters that have jumped on the global TV bandwagon.<sup>30</sup> Among the few public service broadcasters with an international mission are ABC Asia Pacific, EuroNews (owned by public service broadcasters around Europe), NHK from Japan, BBC World, and Deutsche Welle.<sup>31</sup>

There are several reasons for the weak international presence and influence of public service broadcasting. One reason is that national laws in many countries restrict public service broadcasters to a domestic mission. This is often justified by financial constraints. In these countries, there are neither programmes explicitly targeted to other countries, nor technical facilities to broadcast them. A second reason is that many countries consider foreign broadcasting to be primarily a component of foreign policy, i.e. a task of the government, which should not be entrusted to arms-length public service broadcasters but rather should be executed by state broadcasters.<sup>32</sup>

Neither argument should be accepted. Countries should not be able to shirk their responsibility to contribute to international public communication in a non-commercial and non-governmental way by evoking either financial restraints or old-fashioned ideas about foreign broadcasting as state propaganda. This applies first and foremost to the rich and influential countries that dominate international public communication through their commercial media. But it also applies – in the measure of their means – to the smaller and less wealthy countries. The benefits for world peace and welfare certainly outweigh the costs. Further reducing such contributions would mean accepting that the existing imbalances in the international commercial media order, and its consequences, will only increase. The likely consequences of this lack of diversity in international communications include more extremism, more separatism and maybe

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distinction between national and international broadcasters and between commercial, public service and state broadcasters.

<sup>30</sup> As main international commercial Television news broadcasters SPANSWICK 2004 mentions Al Arabiya News Channel, Al Jazeera Channel, CCTV, Channel News Asia, CNN International, and CFII (due to launch in late 2006, owned half by the commercial channel TF1 and public service broadcaster France Télévision).

<sup>31</sup> Ibid. ARTE and 3.sat are not mentioned there, probably as its missions are not international (ARTE focuses on communication between Germany and France, 3.SAT on public communication between Germany, Austria, and Switzerland).

<sup>32</sup> This explains the already-mentioned fact, that most international broadcasting stations are run by governments; and it also explains the difficulty of establishing international public service broadcasters or of transforming the existing national public service broadcasters into international operations.



more terrorism. Ultimately, this could cost much more than the investments needed to enrich international public communication.<sup>33</sup>

That does not at all mean, that international broadcasters should offer a platform for international terrorists. In contrast, both commercial and public service broadcasters should strictly avoid to increase public attention or even to create incentives for terrorists.<sup>34</sup> Instead, it is important to change the conditions that promote international terrorism. Here again, there is no mono-factual and direct causality like „the more international communication, the less international terrorism“. On the other hand it should be obvious that a more intensive public communication increases the willingness to jointly solve international problems and to accept and promote international decisions. This, in turn, worsens the conditions for extremists and terrorists, compared to a world in which the majority of the population of regions, nations or even continents believe that their voice is not taken into account, or not even registered in the international discourse.

## 6. Winners and Losers of a Globalisation of Media Markets

The mentioned advantages (benefits) and disadvantages (costs) of commercialisation will increase with the further globalisation of the media. There will be even greater economies of scale, strengthening the efficiency and competitiveness of the global media companies, and creating new jobs in the countries where these companies reside. But there will also be a further reduction in media diversity. Programmes for minorities, e. g. for small countries, or for small cultural, ethnic or religious communities, will be further marginalized; and programmes for „majorities“, e. g. for large language communities and for large nations, will dominate further, especially for nations with large domestic markets which allow them to dump their programmes abroad.

These advantages and disadvantages are not evenly distributed. Majorities, or „main stream communities“, will gain from a further commercialisation of the media, while minorities will lose.<sup>35</sup> This explains, why there are intense controver-

<sup>33</sup> BERGER/STURM 2005, p. 4, have estimated that alone the costs of the reduced production caused by the news about Sept. 11 were 0,25 % - 0,75 % of the average annual GDP, disregarding intangible costs like the harm of the victims and their families or the growing concerns and fears to become a victim of terrorism. See also FREY/LUECHINGER/STUTZER 2004 and NITSCH/SCHUMACHER 2004 who have attempted to assess the costs of terrorism, too.

<sup>34</sup> HEPP (2002, S. 8) rightly mentions, that terrorists intentionally use the media (and also the globalisation of the media), because they spread the knowledge about its actions, also about local actions. Also see NACOS 2003.

<sup>35</sup> Of course, this is true not only for the media sector, but for international trade in general. The WTO, as well as the World Bank, emphasizes that international free trade benefits all member states. In contrast, empirical studies from WTO objecting institutions show that the advantages are distributed unevenly. An actual study by Carnegie Endowment for International Peace (POLASKI 2006) concludes, for instance, that additional revenues of 58.6 billion US-Dollars (which equivalent only 0.2 % of the gross national products) would be rendered if the agreements of the Doha Round would be put into practice for agricultural and industrial goods. 30.1

sies about this issue, both within nation-states and on the supranational and international levels. A major platform for the international debate is the WTO regime. In the GATS negotiations, the member states of the WTO have to decide about the allocation between goods (ruled by the GATT) and services (ruled by the GATS).<sup>36</sup> Within the services, they have to decide about the allocation of specific services into a “Service Sectoral Classification List”. The latter is important, as some classes (such as telecommunication services) are more liberalized than others (such as audiovisual services). On the basis of this classification list, all member states may request and offer measures for liberalisation. There are currently negotiations that aim to harmonise the “initial requests” from 2002 with the “initial offers” from 2003.<sup>37</sup>

The member states’ positions in these negotiations depend on their national views about the relative capabilities of markets and free trade, and on whether they perceive the media as primarily an economic or cultural good. Additionally, or maybe even predominantly, these positions are determined by the states’ differing chances to making a profit with a commercial audiovisual industry. Therefore, it is not surprising that states with a well-established audiovisual industry and with a sufficiently large domestic market attempt to classify certain services that are currently classified as (less liberalized) audiovisual services (e.g. audio streams) as (more liberalized) telecommunication services. It is also not surprising that – within the audiovisual services – these countries try to eliminate the existing exemptions from free trade (the so called “carve-out”). States with small domestic markets and without domestic audiovisual industries, on the other hand, usually try to preserve their autonomous national audiovisual policies. These states therefore prefer a broader definition of the audiovisual sector, and they try to expand the number and strength of the exceptions for the audiovisual sector.<sup>38</sup>

In addition, the effects of commercialisation and globalisation of mass media on their citizens and societies as a whole determine the states’ positions in the WTO negotiations. If the main stream content of the globalised mass media corresponds to citizens’ opinions and attitudes (and thus confirms and reinforces

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billion US-Dollars would go to the developing countries, 28.5 billion US-Dollars would go to developed countries. However, within the developing countries only the threshold countries would benefit from the additional free trade with agricultural products, and the least developed countries would lose. Additional free trade with industrial products would mainly be to the advantage of Japan, the European States and the United States of America.

<sup>36</sup> See BEVIGLIA-ZAMPETTI 2005.

<sup>37</sup> Ibid.

<sup>38</sup> There are growing concerns, for instance, with the WTO’s attempts to include the audiovisual sector, especially broadcasting programmes, into the GATS. They stem mainly from non-governmental and non-market organisations of civil society. Consequently, the UNESCO CCD mentioned above, does not consider broadcasting programmes (and other audiovisual goods and services) as economic goods, but as parts and forms of national, regional, and local cultures. This allows WTO members to exclude certain audiovisual services from the GATS, and to regulate its production and distribution by national law.



them), the states will evaluate the disadvantages (costs) of globalisation as small. The USA, for instance, is not bothered by American dominance of the international film industry, as these films – in economic terms – fit with the “consumer preferences” of its citizens. A benevolent American government that aims to maximise the welfare of American citizens will therefore promote globalisation. Under these conditions, even an authoritarian government that tries to maximize the welfare of ruling politicians would favour a globalised media supply which is in line with its citizens’ social, cultural, and political attitudes, and thus would stabilize the existing political system.

In contrast, the disadvantages (the costs) of globalisation are high, if citizens’ attitudes (in economic terms again: consumer preferences) deviate considerably from the mainstream supply of a globalised commercial media industry. With regard to cultural attributes, media economists traditionally have labelled this as “cultural discount”.<sup>39</sup> However, to what extent the (globalised) supply differs from citizens’ demands depends not only on cultural peculiarities but also on social and political attributes. If, for instance, in a given country, the political attitudes of citizens contrast with those presented by a globalized mainstream media industry, this could induce a rapid and perhaps uncontrollable social and political transformation. Even benevolent governments could consider this as high costs for the society (not to mention authoritarian governments, for which the influences of foreign mass media could be the cause of a peaceful or violent revolution).

Figure 2 illustrates this. It distinguishes between states for which an increased commercialisation of the audiovisual sector would generate

- a) high or low benefits of a further globalisation of the media (due to additional market revenues), on the horizontal axis; and
- b) high or low costs of a further globalisation of the media (due to a deviation and modification of the citizens’ cultural, social, or political attitudes (in economic terms: consumer preferences with regard to audiovisual services), on the vertical axis.

States that yield additional revenues from a further commercialisation of the audiovisual sector and that are not affected by large discrepancies between demand and (globalised) supply (cell 2 in figure 2) will clearly prefer the globalisation of the audiovisual sector, and they will support the WTO regime (in figure 2 the USA is taken as example). States that yield no or only small additio-

<sup>39</sup> If for instance viewer (consumer) preferences for films in a country differ considerably from the output of the Hollywood film industry, the costs of a further globalisation of the film industry are high. Already in the sixties of the last century this effect was discussed and criticized as “media imperialism”, with regard to the dominance of US-American media products also as “Americanization” of the media, e. g. by SCHILLER 1969, p. 8: “Free trade is the mechanism by which a powerful economy penetrates and dominates a weaker one, the “free flow of information”, the designated objective incidentally of UNESCO, is the channel through which life styles and value systems can be imposed on poor and vulnerable societies.” Similar arguments are provided by Noam, Collins, and Tracey, in NOAM/MILLONZI 1993.

nal revenues and are considerably affected in their cultural identity (cell 3), on the other hand, will combat the WTO regime (Malaysia is taken as example).<sup>40</sup>

Figure 2:  
The Position of States as Supporters or Opponents of the Globalisation of the Audiovisual Sector as Determined by the Related National Benefits and Costs

		benefits of a commercialisation of the AV-sector due to increased market revenues	
		low	high
costs of a commercialisation of the AV-sector due to increasing cultural, social, and political discrepancies between supply and demand	low	undetermined action ① (The Netherlands)	supporting globalisation of the AV-sector ② (USA)
	high	combatting globalisation of the AV-sector ③ (Malaysia)	undetermined action ④ (France, Germany, Canada, U.K, Japan, India, China)

For states that do not gain considerable additional revenues from a further commercialisation of the audiovisual sector and also are not considerably affected by large discrepancies between demand and (globalised) supply (cell 1, e.g. the Netherlands), the action is not determined per se. The same is true for states that do gain considerable additional revenues from a further commercialisation of the audiovisual sector, but also have to suffer from expanding discrepancies between demand and (globalised) supply (cell 4, e. g. France, Germany, Canada, the U.K., Japan, India, and China). In these cases the positions depend on the nations' evaluation of the costs and benefits, which often are intangible and seldom are evaluated explicitly and transparently.

<sup>40</sup> It is a simplification that the nations' decisions about combating or supporting the globalisation of the AV-sector only are determined by the related benefits and costs. Also states whose net benefit from globalising the AV-sector is negative might support it (and vice versa states whose net benefit is positive might condemn it), if they are compensated for their decisions by advantages in other sectors. BIRDSALL /LAWRENCE 1999, p. 147, state that such bargains are common practice: "In the Uruguay Round, for example, many developing countries were only willing to conclude an agreement on intellectual property in return for the elimination of the Multi-Fibre Arrangement, which restricted textile export from developing countries."



Some states, like France, seem to consider the costs of a further commercialisation of the audiovisual sector as high, perhaps because of the assumed alteration of the (cultural) preferences that were induced by a globalisation (Americanisation) of audiovisual products, especially of movies and broadcasting programmes. Although France would probably benefit substantially from a further commercialisation and globalisation of its audiovisual sector, as there is a large Francophile and French-speaking community worldwide, and although it possesses a considerable audiovisual (film) industry, it always has opposed the WTO's attempts to liberalize the audiovisual sector,<sup>41</sup> and it was one of the European nations that recently paved the way for the adoption of the UNESCO CCD, mentioned above. Similarly Canada traditionally has defeated all attempts to commercialise the audiovisual sector, especially by its neighbour state, the USA, although Canada's audiovisual products would find large markets in English and French speaking foreign countries.<sup>42</sup>

The positions of other countries, like Germany, the U.K., India, Japan, or China, are more ambivalent, and have been less consistent and continuous in the past. In these countries many media companies would definitely benefit from a commercialisation of the audiovisual sector, where they could raise additional market revenues. These companies consequently favour commercialisation, and they support the WTO regime. On the other hand, there are voices from civil society organisations that resist a commercialisation of the audiovisual sector. The public service broadcasters in these countries usually share these concerns. Hence, a clear national position cannot be identified for these countries.<sup>43</sup>

It would be interesting, but probably also difficult, to analyse the case of China using this model. With regard to the gigantic domestic market, one could assume that China, similarly to the USA, would favour a further globalisation of the audiovisual sector. However, one should realize that this would only affect the viewers and listeners of Chinese audiovisual products living abroad. While this is a large community, it is much smaller than the number of Chinese living in their home country. Additionally, and maybe even more importantly, a full liberalisation would not only open up world markets for Chinese programming, but also Chinese markets for foreign programming, especially from the USA.

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<sup>41</sup> See CHAUDENSON 2003, COCQ 2005.

<sup>42</sup> The Canadian broadcasters cannot compete with the US-american networks that possess considerable economies of scale. The Canadian government, therefore, traditionally has regulated the Canadian broadcasting system to enable its domestic broadcasters to provide content for the Canadian citizens. See the instructive report of the „Standing Committee on the State of the Canadian Broadcasting System“ unter [www.parl.gc.ca/InfoComDoc/37/2/HERI/Studies/Reports/herirp02/18-Ch17-e.htm#4](http://www.parl.gc.ca/InfoComDoc/37/2/HERI/Studies/Reports/herirp02/18-Ch17-e.htm#4), also see DORLAND 1996, ACHESON/MAULE 2005

<sup>43</sup> For Germany, the U.K., and other ambivalent European countries such a clear position might not really be necessary, though, as the European states are not directly involved in the GATS negotiations (the European Commission takes a common position on behalf of all European states). However, as unanimity is required for all contracts that affect the cultural and linguistic diversity of the European Community, the national interests of the member states are guaranteed.

One can assume that the “costs of a globalisation of the audiovisual sector due to increased cultural, social, and political discrepancies between supply and demand” connected with such imports are perceived high in China, especially if possible influences on its political ideology and political system are taken into account.<sup>44</sup> China therefore, like any country, has to weigh the advantages and disadvantages of opening its media markets, and it is an open question which factors will dominate and determine the political future. For a political economist, it is most interesting to observe this process of qualifying and preferably quantifying the national costs and benefits that are related to opening up China’s media market.<sup>45</sup>

No matter how China and other countries act in future decisions about the WTO regime in general and in further GATS negotiations about the audiovisual sector in particular, it is obvious that all states will be highly affected by the organisation of the media industry and of international public communication. The media industry generates a great deal of money and many jobs – with a strong upward trend.<sup>46</sup> It has a high impact on public and political communication, both within and among nations. Therefore, it is worth examining carefully the legal and factual decision-making processes around international communication, cultural and other policies that affect the ability of states to regulate the media. This requires instruments and institutions which prevent the domination of these decision-making processes by large countries that mainly profit from a further globalisation of the media, and provide room for the influence of small countries whose national identities are most threatened by media globalisation. The discussion of the UNESCO CCD has increased the awareness about these matters, but its acceptance does not necessarily mean that this sufficiently tempers the strong influence towards globalisation that is induced by the WTO-regime. It still remains to be determined during the next WTO-negotiations, to what extent the UNESCO CCD will become relevant politically.

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<sup>44</sup> That these costs are evaluated as high – at least by the Chinese Government – is indicated by the strict censorship that still is common for films and broadcasting programmes in China (POLUMBAUM 2003). From this perspective the new digital services might be a thread for the Chinese government: “The expansion of these new channels of communications has important implications for the dissemination of knowledge and ideas in a society where news and information traditionally have been restricted. The growth of Internet access and activity has prompted some Western commentators to attribute to this medium the ability to silently but inexorably undermine Communist rule, citing as a harbinger the growth of the quasi-religious Falun Gong movement through computer-mediated communication and the Chinese government’s panicky reaction in outlawing the group in the summer of 1999. However, the transformation of China’s mass communication system may have its most profound repercussions not in ideological domains but rather in much more mundane details of material life.” (ibid, p. 225)

<sup>45</sup> KOPS 2005

<sup>46</sup> See once again the outlook by PRICEWATERHOUSECOOPERS 2005.



## 7. Can the New Digital Services Prevent the Decline of Public Communication?

The economic and political consequences of the globalisation of the media described above were restrained to a *ceteris paribus* clause, especially to the assumption that the communication technology does not change. This obviously contrasts with reality: With the advances in communications technology – communications satellites, wireless, fibre-optic, broadband, computers, and linked (networked) database –,<sup>47</sup> with the switch from analogue to digital production and broadcasting, and with the rapid and global success of the world wide web during the last years,<sup>48</sup> many new communication techniques have been invented and implemented (like audio- and video-streaming, E-Mails, E-papers, web-chats, web-logs, and several other digital services that can be transported by the web).<sup>49</sup>

These new communication techniques have supplemented and partly substituted the traditional (analogous) broadcasting techniques. They have enlarged the sources for public communication, the ways by which public documents are distributed, and the variety of opinions, both for commercial media companies that benefit from diminishing costs for the production and broadcasting of radio and television programmes (and alternative digital services like audio and video streaming), and for non-profit organisations and individuals that have been enabled by the new digital communication techniques (e. g. by non-commercial web-sites, web-logs, digital newsletters or portals) to articulate their views and to influence public communication at low costs. The voices of commercial media, also of monopolistic commercial media, have been supplemented by these new communication techniques; sometimes they have also been objected to and corrected. Especially for minorities, e. g. of local, religious, ethnical or linguistic origin, these techniques have offered new, affordable means to express attitudes that would have been crowded out by commercial restraints in the traditional (analogous) forum.<sup>50</sup>

However, also for these new communication techniques the economic logic mentioned above applies in the long run. They are affected, too, by the main-

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<sup>47</sup> See for a description of these advances in communications technology KING 2003, PAVLIK/POWELL III 2003, HA/DICK/KWAN 2003.

<sup>48</sup> See KING 2003.

<sup>49</sup> *Ibid.*, also see HARDY 2003, PAVLIK/POWELL III 2003.

<sup>50</sup> *Ibid.*, also CHERRIBY 2003, ROGERSON 2003, STERN 2003. With regard to these new offers COMPAINE 2005, p. 1, seeks to assess that whether “we are better able to find the variety of news, entertainment, and information that we want and need, from more sources, with reasonable cost, than a generation or more ago when presumably the media were less concentrated and, by inference, ‘better’”. For online newspapers SPARKS 2003, p. 125, concludes: “Those newspapers whose speciality is servicing the public sphere attract far more visitors than those whose speciality is entertainment of one form or another. On this gloss, the evidence seems to suggest that the public sphere is much better served online than it has ever been offline.”



stream pressures of commercialisation and globalisation, and although they combat the diminishing variety of the traditional media, in the long run its mainstream orientation will grow and its variety and contribution to public communication will diminish.<sup>51</sup> Web-logs (or blogs) make this obvious, for example. Originally founded as base-democratic voices against the mainstream, the most prominent bloggers have discovered opportunities to make money, e. g. with pop-ups and banners, or – worse – with articles that fake to be independent but in fact are paid for by companies or political organisations (“advertising founded content”). In the USA the most prominent bloggers, like instapundit, Daily Kos, or Back-to-iray.com, make a fortune nowadays; Andrew Sullivan from the “Time Magazine” is said to earn 8.000 € per day with his web-log.<sup>52</sup> And many bloggers who have started enthusiastically have already finished their engagements or will finish it, when they realize that the general rules of the media are also true for this new communication technique: Only those few offers catch attention that are made with high engagement, with professionalism – and with sufficient money.

Figure 3 shows the results of the two contrasting trends: on the one hand the effects of globalisation and commercialisation that over time reduce the variety of public communication, on the other hand the effects of new communication techniques that at the same time, at least temporarily, increase variety (in figure 3 by means of the fictitious techniques 1, 2, and 3, that emerge between 1995 – 2000, 2003 – 2006, and 2010 – 2012). It is an open question which of the two effects is stronger over time, and empirical investigations have come to controversial results.<sup>53</sup> Probably there have been periods (and will be periods in future),

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<sup>51</sup> This corresponds with the conclusion of KHIABANY 2003, p. 137, that “the typical hype about the globalizing and democratizing impact of the Internet does not fit easily with the market logic.” Similarly SPARKS 2003, p. 125, who evaluates the value of online newspapers for the public sphere positively (see the last footnote), mentions that “the ability to exploit the potential of the web in enhancing the public sphere is only possible to those media institutions that are relatively free of commercial constraint” (like the BBC) and that “other Media, which work under the daily pressure of the market place, have been unable to discover a model that allows them to deliver even their offline content and still operate profitably online.”

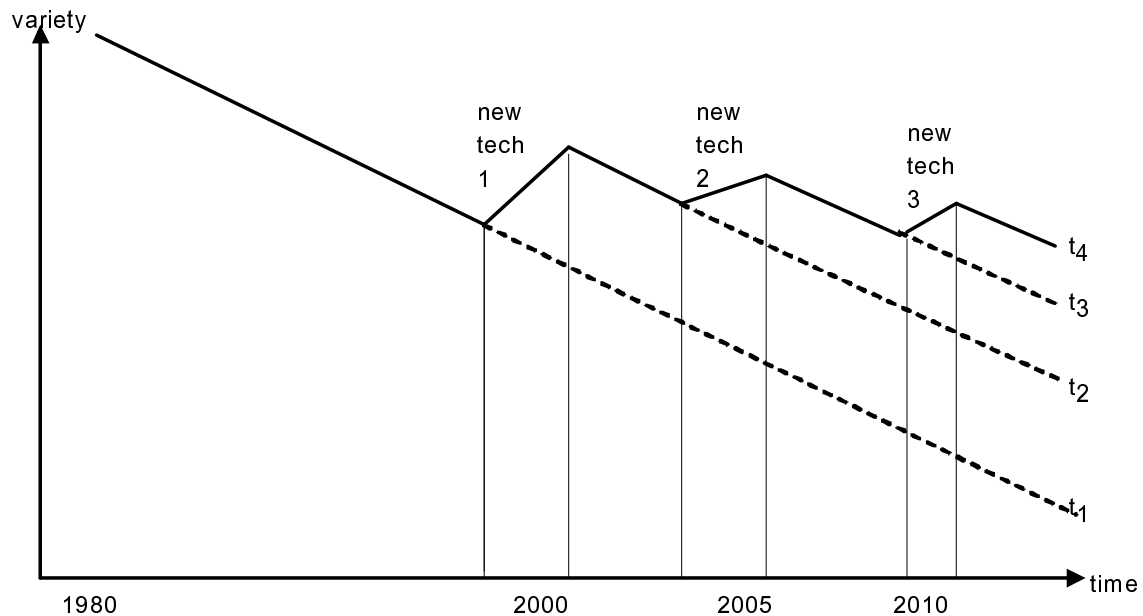
<sup>52</sup> See: “College student one of many making blogging pay” by Anthony Martinez Beven, Gannett News Service, published Feb. 14, 2006, <http://www.citizen-times.com/apps/pbcs.dll/article?AID=/20060214/LIVING08/602140318/1004> www. For a ranking of the most popular web-locks (based on the number of citations and daypop scores) see <http://www.daypop.com/blogrank/archive/2003/05/20030510043001.htm>. Also see Beven, Antony Marinez: Blogging for Bugs, in: Detroit Free Press, 4. February 2006, <http://www.freep.com/apps/pbcs.dll/article?AID=/20060204/NEWS09/602040304/025/FEATURES&template=printart>.

<sup>53</sup> See for example the discussion between Compaine and McChesney at [www.opendemocracy.net](http://www.opendemocracy.net) [compaine-mcchesney]). These discussions often do not distinguish between the effects of the economic rules *within* a specific technical and institutional media framework (that reduce variety) and the effects that stem from *changes* of the technical and institutional media framework (that may increase variety). Partly the controversies also result from the fact that some discussants refer to the variety of *supplied* content (that *ceteris paribus* has increased with the new technologies) whereas others refer to the variety of *demand* (received, consumed) con-



during which the reduction in variety, caused by commercialisation, has been (and will be) counterweighted, maybe even overcompensated by the additional variety of the emerging new communication techniques.

Figure 3:  
Diminishing Variety of the Media in the Course of Time?



These periods should not suggest, however, that new digital services alone could consistently prevent the decline of public communication. They can contribute to this target, and from that perspective public supports to invent and implement new communication techniques are not only advisable with regard to the efficiency and wealth of modern communication societies (as e. g. the European Community claims in the Lisbon protocol),<sup>54</sup> but they also are advisable with regard to its positive effects for public communication (as e. g. the European Community recently has claimed in its White Paper on Communication

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tent (that might have decreased due to the rules of the market and of the “economics of attention making”, FRANCK 1999). Data about online-services provided by Jupiter Media Metrix have proved, for instance, that the number of content providers that supply 60 % of the total user time has decreased between 3/1999 and 3/2001 from 110 to 14 (i. e. -87%, see SCHULZ/HELD/KOPS 2002, p. 126). Newer data confirm this concentration of demand for online services. According to a study by JUPITER RESEARCH 2005 the top three portals (AOL, MSN, and Yahoo!) controlled 35 percent of the time users spent online in 2004. Together, the “big four” – these three players and Google – accounted for 52 % of US online advertising spending.

<sup>54</sup> The Lisbon strategy is based on the assumption that a stronger economy will create new jobs in the EU, ensuring sustainable development and social inclusion, which will themselves drive economic growth even further. See [www.http://europa.eu.int/growthandjobs/index\\_en.htm](http://europa.eu.int/growthandjobs/index_en.htm).

Policy).<sup>55</sup> But in addition, the economic forces that reduce the variety and the public access of both the traditional broadcasting services and of the new communication services should be tempered. Even for periods during which new communication services considerably increase the overall variety of public communication (in figure 3 e. g. assumed for the years between 1998 and 2005), this policy remains appropriate, as it can reduce the decline of variety both for the traditional mass media and for the new forms of mass media.

In that regard it also is advisable to extend the rules by which the economic forces are tempered for traditional broadcasting (see chapter 3) to the new communication services. The European Community has recently started to tackle this issue by amending the European Television Directive.<sup>56</sup> This regulatory framework, originally restricted to analogous broadcasters (in the new terminology of the European Commission called linear services), shall be extended to the new communication technologies (in the new terminology called non-linear services), which makes sense, as these new services can have the same (positive or negative) effects on public communication as the traditional broadcasting services.<sup>57</sup> From that point of view it is also logical to protect these new services against commercialisation and against technical and financial access barriers, e. g. by appropriate must carry rules, by clear rules for the separation of journalistic content and commercial promotion, by guaranteeing access to short reports on events of public interest, by exercising a right of reply for people who have been impugned or unfairly treated by these services, and by allowing public service broadcasters to provide these new services as complements (or as substitutes) of their traditional broadcasting programmes.<sup>58</sup>

All of these proposals are controversial, though, as the supporters of a further commercialisation of the media want to treat the new communication services as marketable audiovisual services that can be released from the regulations of traditional broadcasting programmes and can be provided by unregulated services of the market. During the next months the European Commission must work out an amendment of the TV Directive that meets both the contrasting expectations of the audiovisual industry and of non-market organisations (like consumer organisations, viewer and listener organisations, community broad-

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<sup>55</sup> See COMMISSION OF THE EUROPEAN UNION 2006. This white paper can be considered as a reaction on the “communication gap” between the European Union and its citizens. It emphasizes the importance of public communication among the member states, in order to create a European public sphere. See [http://europa.eu.int/comm/communication\\_white\\_paper/doc/white\\_paper\\_en.pdf](http://europa.eu.int/comm/communication_white_paper/doc/white_paper_en.pdf).

<sup>56</sup> See [http://europa.eu.int/comm/avpolicy/regul/newtwf\\_en.pdf](http://europa.eu.int/comm/avpolicy/regul/newtwf_en.pdf).

<sup>57</sup> From that regard it is right to extend the TV-directive to new “non-linear services”. On the other side, the distinction the European Community makes between “linear” and “non-linear” services becomes elusive and redundant in the course of digitalisation and technical convergence. In the end there will remain no substantial difference between pushing a button on a TV remote control that selects a TV channel and clicking a symbol on a website that offers audio- or video-streams.

<sup>58</sup> For a discussion of these elements of the draft of the content directive see [http://europa.eu.int/information\\_society/newsroom/cf/itemlongdetail.cfm?item\\_id=2343](http://europa.eu.int/information_society/newsroom/cf/itemlongdetail.cfm?item_id=2343)



casters and public service broadcasters), and that at the same time is acceptable for all 25 member states of the European Community (whose according views also differ considerably). This will be a complicated process – and the result will have strong implications for the public communication within and among the member states of the European Community.

## 8. Summary

In economic terms, globalisation is the (spatial) expansion of markets, the transformation of small, local, regional, or national markets into supra-national, preferably worldwide markets. New technologies, especially digitalisation, coupled with institutional and political change, are driving the accelerating globalisation of media markets.

This market expansion optimises media output by decreasing the minimum average cost of media products (e. g. per newspaper copy or per TV programme hour/viewer), thus raising both surpluses for media consumers and profits for media companies. Successfully globalised media companies also create higher turnovers, higher profits and new jobs in their home countries.

From this perspective, globalisation is a positive and legitimate strategy which benefits media companies and their customers. Promoters of free trade, like the World Trade Organisation (WTO), therefore evaluate globalisation of media industries positively. They support attempts to treat the audiovisual industry like other industries by subjecting them to WTO rules for the protection and expansion of world wide free trade (the “General Agreement on Tariffs and Trade” (GAT) and the “General Agreement on Trade in Services”, GATS).

The so-called non-rivalry of consumption of the media is responsible for remarkable reductions in unit costs: Once a master copy exists, there are few or no additional costs to supply the product to additional users. With globalisation, therefore, not only do media products become cheaper and more competitive (with the above-mentioned benefits for both media companies and consumers), but the increasing scale of the companies’ output also leads to a reduction in the number of media companies: Fewer companies produce larger outputs (more copies of newspapers, more TV programme minutes, more page impressions etc.).

As in other industries, such concentration has disadvantages for consumers: Oligopolistic and monopolistic corporations can abuse their market power, as the competition among suppliers is weaker than in perfect markets. This can lead to higher prices and/or lower quality for media consumers. As this is an industry unlike any other, its economic power can translate into editorial and political power. This can have the additional and negative consequence that media companies can push imbalanced and biased opinions and coverage to further their own agendas and to influence public attitudes, especially in the political arena. Although the media are a central actor for the political system, in both democracies and authoritarian states, most countries do not exercise pub-

lic control over media companies, but treat them like entities that sell cars, steel or clothing.

There is another important economic factor that drives media companies to focus on “mainstream” content. Even if the drive towards concentration can be restricted by a suitable competition policy, and regardless of the structure (monopolistic or atomistic) of the industry or the size of the companies involved, the unit cost of minority content is always higher. Due to the non-rivalry of consumption of the media the economies of scale are so great that it is impossible for minority content designed for small audiences to compete with mainstream programming. This is true even if minorities are willing to pay more for their own programming.

Globalisation intensifies this inherent tendency towards “more of the same”: When media markets expand, audiences tend to increase for programming that was already popular in smaller regional and national markets: sporting events, TV movies, popular daily soaps, or international pop music. In contrast, programmes that appeal only to minorities within regional and national markets, such as reports about local events, regional or national cultures, or programmes in local or regional dialects and locations, are unlikely to reach broader audiences even when they are more widely available in globalised markets.

A shrinking diversity and an uneven access to distribution jeopardize public communication, also the political discourse within nations. Minority voices, whether ethnic, religious, cultural, lingual, regional, or political, have fewer opportunities to articulate their opinions and to participate in the public marketplace of ideas. Mainstream positions become more dominant and more rigid. This reduces a country’s coherence, integration, fairness, and flexibility to find appropriate common solutions for new problems. These malfunctions can be mitigated by appropriate regulation of the commercial media that reduce the impact of market rules, and through vibrant non-commercial and non-governmental media, e.g. public service broadcasters.

Similarly, globalisation and commercialisation affect international public and political communication. Small countries experience a reduced ability to participate in international dialogue and to express their opinions and expectations; conversely, the dominance of large and politically influential nations increases further. Here again, appropriate regulation of commercial media companies and strengthening non-commercial media providers can address these market malfunctions.

In practice, only a few public service broadcasters embrace an international mission. One reason for this is that national laws in many countries restrict public service broadcasters to a domestic mission. This is often justified by financial constraints. In these countries, there are neither programmes explicitly targeted to other countries, nor technical facilities to broadcast them. A second reason is, that many countries consider foreign broadcasting to be primarily a component of foreign policy, i.e. as a task of the government, which should not be entrusted



to arms-length public service broadcasters but rather should be executed by state broadcasters.

Neither argument should be accepted. Countries should not be able to shirk their responsibility to contribute to international public communication in a non-commercial and non-governmental way by evoking either financial restraints or old-fashioned ideas about foreign broadcasting as state propaganda. This applies first and foremost to the rich and influential countries that dominate international public communication through their commercial media. But it also applies – in the measure of their means – to the smaller and less wealthy countries. The benefits for world peace and welfare certainly outweigh the costs. Further reducing such contributions would mean accepting that the existing imbalances in the international commercial media order, and its consequences, will only increase.

The likely consequences of this lack of diversity in international communication include separatism, extremism, and eventually also terrorism. It is right that the mass media shall not provide a stage for extremists and terrorists to present and induce their targets. But it also should be realized that the causes for separatism, extremism, and terrorism partly are created by the mass media itself, as individuals and communities who feel ignored and backed out from public communication might consider terror as the only way to catch attention from those who steer their destiny. Ultimately, this would cost much more than the investments needed to enrich international public communication and to offer public platforms in the media for the underprivileged, isolated and discriminated.

To a certain degree the implementation of several new digital services that complement and partly substitute traditional broadcasting programmes cure these deficiencies. To broadcast programmes and other communication services (like digital newspapers, chat rooms, web-logs and the like) via the web and digital satellites reduces costs; and (only) by means of these services many organisations and individuals can afford to participate in the public communication – also on an international level. They increase the number of voices in the public discourse, and they thus increase its variety and plurality.

In the long run also these new communication services get under pressure by the economic rationales that threaten the diversity of the traditional broadcasters. And as the traditional broadcasters successively cooperate with the new digital services, there even might be cross media effects that transport the economic pressures to provide mainstream content from one media to the other. Even for periods during which new communication services increase the overall variety of public communication it therefore remains appropriate to temper these economic forces, both for the traditional broadcasting services and for new communication services.

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