EUROPEAN MEDIA STUDIES

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chapter one

The European media landscape

The media in Europe have undergone considerable transformation since the end of the Second World War. Weymouth and Lamizet (1995: 8) identify two stages in their development: from 1945 to 'approximately' 1980, and from 1980 onwards. While all divisions are slightly arbitrary, it is commonly accepted that in the late 1970s a shift began to take place in the nature of mass communication and the structure and content of the media industries. The shift can be associated with a range of unprecedented technological, social, economic, political and ideological developments, which have impacted the media in several ways, the most important of which has been to undermine the national foundations on which the European media had operated since 1945. Up to 1980 the media played a key role in reinforcing national identity and providing people with their sense of belonging. Since 1980 their ability and capacity to reflect and represent national communities has been called into question. What, when and how Europeans watch, hear and read has changed, and changing media consumption habits are central to understanding new forms of group identities and allegiances that are emerging. The processes by which the media are produced have also been fundamentally restructured, including the demise of public service broadcasting, which singled out European media systems from their counterparts elsewhere in the world. One crucial aspect of this restructuring has been the growth of a small number of Europe-wide conglomerates who have come to dominate the media landscape in Europe. The political, economic and cultural consequences of the concentration of media ownership in Western and Eastern Europe are open to debate.

The media in 1945

In order to examine the changes that are taking place in the European media landscape it is important to understand what has happened to European society in the post-war period. The Second World War profoundly weakened the media, as it did every other aspect of society. After five years of fighting the basic infrastructure of European society had been destroyed. In 1945 the primary objective was the rebuilding and reconstruction of economic, social and political life. Most Europeans craved political stability. The initial impetus for the establishment of what was to become the EU was not simply the economic reconstruction of the continent, but also the desire to ensure that national differences and political conflicts would never again result in war. The peoples of Europe wanted to see an end to the traditional enmities that had divided them. They also demanded social and economic reform, to alleviate the plight of ordinary men and women who had suffered most during the war. There was a conviction among working people that the social and economic deprivations of the Depression years would not return. The result was that national governments – with a huge influx of US aid in the form of the Marshall Plan – set about reconstructing their societies on the basis of a more egalitarian economic and social order. The clearest manifestation of this was the birth of the welfare state, which promised to take care of European citizens from cradle to grave. For the next thirty years, until the mid-1970s, the welfare state extended its reach. Accompanied by steady, consistent economic growth – most spectacular in West Germany – Europe witnessed the reassertion of democracy (with outside help in the cases of Italy and Germany), a high degree of political stability (albeit frozen in by the cold war) and a level of social harmony never before experienced.

The role of the media in this period was to help to 'revitalise democratic principles and reinforce the national identities of the newly liberated European nation-states' (Weymouth and Lamizet 1995: 13). To do this the press had to undergo a process of political re-education. Fascist newspapers in Germany and Italy were closed down, as were newspapers in occupied Europe that had collaborated with the enemy. Newspapers that continued to be published in occupied France were banned in 1944; only 28 of the 206 daily newspapers published in 1939 were allowed to remain in business (Kuhn 1995: 54). New newspapers, such as *Le Monde*, were born of the effort to rebuild a new press suited to the process of reconstruction. They did this by reporting and reflecting a broad range of political viewpoints; the following decade witnessed a high degree of political pluralism in the west European press. However, it was during this period that newspapers lost their pre-eminence as the primary medium of mass communication.

From the 1960s, broadcasting, and television in particular, became the main (as well as the most trusted) source of information for a significant majority of western Europeans about what was happening around them. A recent survey found that 99 per cent of the population of the EU watch television regularly (Eurobarometer 2002). A similar picture emerges from the candidate countries who joined the EU in 2004. Unlike the press, broadcasting in Europe had been organized as a public service, rejecting the market as an effective mechanism for the allocation of resources and the provision of choice. The public service mission to educate as well as inform and entertain ensured broadcasting played a key role in the development of citizenship and the rebuilding of national communities. The history of European broadcasting up to 1980 is a history of national broadcasters, such as the British Broadcasting Corporation (BBC) in the United Kingdom, Danmarks Radio (DR) in Denmark and Norsk Rikskrinkasting (NRK) in Norway. These organizations saw their role as providing entertainment, information and education to the whole nation, attaching great importance to the role of broadcasting in building citizenship, encouraging political participation, fostering a sense of national unity and identity and defending the public interest. To do this they were provided with a virtual monopoly on broadcasting, most Europeans having only one or two channels to watch. Regional or local broadcasting usually formed a subsidiary part of the national broadcaster's operation, with the exception of Germany (whose broadcasting system was rebuilt after the war on a regional basis), Switzerland and Belgium. National governments were closely involved in the running of broadcasting and, as a result, used the medium in varying degrees to promote their plans for post-war reconstruction (Weymouth and Lamizet 1995: 14). In the process of reconstruction, the medium was often paternalistic and committed to forms of representation which emphasized the values of the national community at the expense of minority social groups.

The political and economic reconstruction of Western Europe in the late 1940s and the 1950s took place against the background of the social and moral values that had characterized the old order. Traditionally European societies were highly stratified, divided into social groupings who knew their place in the social hierarchy. The distinctions between these groups were based on clear differences in their ideological commitments, rooted in their class or religious affiliations. Individuals defined their personal identity and material well-being in terms of social class and religion (Hallin and Mancini 2004: 263–7). Social life was structured around institutions such as the church, trade unions and political parties. These bodies organized leisure activities, sports and voluntary activities, as well as schools, hospitals and welfare. They also had their own media. As the dominant media prior to the Second World War, the composition of the press reflected class loyalties and allegiances. Newspapers served the interests of different classes and social groups, many acting as the official mouthpieces of political parties or religious communities. The first half of the twentieth century had witnessed a gradual decline in the social influence of these groups, as the state began to take over more of their functions and develop people's allegiance to the nation, but the clear cultural, social and economic divisions in European society lasted into the immediate post-war period. Individuals still derived their social and moral values, attitudes, assumptions and behaviour from their class and group identity, which was reflected in the structure and consumption of the European media. Traditional social mores and attitudes were not to endure with a corresponding change in Europe's media.

Forces of change

Since the late 1970s there has been a fundamental change in the European media landscape. Technology is often seen as the driving force of the radical and extraordinary changes. Technological change has led to a proliferation of the ways of delivering information and entertainment to European households. Satellite and cable have provided the opportunity to create more media which are instantly available across national boundaries. The videocassette recorder (VCR) and interactive services such as the television remote control enable media consumers to have more say over what they consume and when they consume it. Computers have helped to reduce the costs and increase the efficiency of newspaper and magazine production. The internet offers individuals and groups new forms of expression, which threaten the traditional role of journalism in collecting and processing information. We are now embarking on a greater technological leap forward with the advent of digital technology, which 'represents the most significant innovation since the advent of television' (Chalaby and Segell 1999: 352). Digital technology, by increasing exponentially the amount of frequency space, not only speeds up considerably the transmission of information and images, but also increases the capacity to transmit more material and provides for interactive services for listeners and viewers. It promises a new 'media revolution' in that it will result in 'the definitive end of the analogue Gutenberg era' (de Bens and Mazzoleni 1998: 165).

Technological developments hold out a range of possible changes in the media industries. However, many in these industries, as well as those who comment on them, are easily led astray by what they perceive as the power of technology. They see technological change as the primary determinant of what is happening to the European media and often ascribe a degree of certainty and predictability to the process. But there is great uncertainty as to the changes new technologies are generating. Sociologist Tony Giddens talks about 'living on a high technological frontier which absolutely no-one understands and which generates a diversity of possible futures' (quoted in Chalaby and Segell 1999: 354). Chalaby and Segell (1999) speculate about the increased sources of uncertainty and the level of risk created by digitalization for those in the broadcasting industries. The changing media landscape in Europe cannot be explained solely and simply in terms of technological developments. Political policy and socio-economic and cultural factors are as important, if not more so. Winston (1998: 11) points out that these factors can act as a brake on the 'potential of the device to radically disrupt pre-existing social formations', while Levinson (1997: 10) highlights the 'profoundly unintended consequences of any information technology'. Ultimately it is only possible to understand the changing media landscape in Europe by locating technological advances in the context of political, economic, social and cultural changes.

Politics has played a crucial role in the restructuring of Europe's media landscape. Since the late 1970s, the election of European governments, of both left and right, committed to a free market ideology has been of great significance in shaping the development of the European media. They have passed legislation which has resulted in the liberalization and deregulation of the media industries. What is happening in the media industries is part of a wider neoliberal reaction against government intervention in all aspects of social and economic life. Unlike the immediate post-war years, belief in the market as the proper determinant of what the public is offered and what it chooses to consume has taken hold across the continent. Policymakers varied in their commitment to the market and, as a result, the pace of media deregulation differed from country to country. Many smaller countries were caught up in the slipstream of the changes in the larger media markets of Britain, France and Germany, while rampant deregulation took hold in Italy as a result of politicians' inability to produce any broadcasting policy. The pro-market stance of many European governments and policymakers since 1980 is based on the view that the market will increase consumer choice, promote the growth of the media industries and bring greater economic benefits (Humphreys 1998, cited in Steemers 2004: 36). This ideological shift reflects, in part, developments in the broader socio-economic environment which have stressed individual choice and consumerism.

Since the mid-1960s Europe has experienced unprecedented social and economic change, which has led to declining loyalty to the institutions that used to structure European social life. This has had a significant impact on the organization, structure, performance, practice and content of the media. Perhaps the most significant development is the expansion of the economies of Europe. Increased affluence and the emergence of the consumer society produced a fundamental transformation in people's lives. Leisure time has expanded enormously and today it is estimated that the average European spends more hours per week on leisure activities than work. Central to these activities is the use and consumption of the media, which increasingly constitutes an important part of our daily lives. More crucially, affluence and economic growth have brought about a secularization of European society which has weakened the social bonds that characterized pre-war European society (Hallin and Mancini 2004: 178–9, 263–77). Economic growth in post-war Europe emphasized individual economic success. Together with increased educational attainment, this has reinforced the individual's sense of self, shaking his or her allegiance to social and political groupings.

Traditional allegiances have been weakened further by the fragmentation of European society. Urbanization hastened the decline of rural life and the proportion of people working on the land declined massively in the immediate post-war period, resulting in the demise of the peasant and farming communities who had played a considerable political and economic role in both Southern and Northern Europe. Rural decline was followed by the collapse of the heavy industries of coal, steel and iron from the 1970s onwards, which helped to break down the solidarity of the industrial working classes (see Weymouth and Lamizet 1995: 14–15). Regular churchgoing and other forms of religious piety have diminished drastically (Kascuba 1993: 200). Membership of political parties declined as social and economic change weakened the foundations on which the mass political parties of the early twentieth century were built. Without strong attachment to religious or class faith, political parties built up around distinct social groups, and particular ideological lines were replaced by 'catch-all parties' whose primary aim was to capture votes rather than represent groups or ideologies (Hallin and Mancini 2004: 265). New social groups and divisions are emerging as the conventions and norms that traditionally shaped everyday life have waned. This can be seen across various aspects of daily life in Europe.

There has been a revolution in the lives of young people. Youth cultures emerged in the post-war period. In the 1950s and 1960s increased leisure time and rising purchasing power were responsible for young people's growing independence. This independence was celebrated by the creation of lifestyles and activities which brought young people into conflict with the older generation. Women's roles are changing. Women are escaping the domestic sphere of home and family to participate more broadly in society. This represents a challenge to the male-dominated and male-oriented nature of European society. While European society may still be organized on patriarchal lines, women today have more opportunity to shape how they conduct their lives. The migration of peoples into Europe has resulted in the rise of new demographic groups. The increased presence of so-called ethnic minority, or 'othered', groups poses a number of challenges to Europe and European institutions. Husband (1993) draws attention to the contradictions in the EU's response to migration. The EU stresses the rights of ethnic minorities, challenges racism, promotes equality and celebrates a multicultural Europe, while at the same time constructing 'Fortress Europe' through sealing the continent's borders to the entry of migrants and affirming a 'Euro-kultur' which marginalizes othered identities. Similarly, Sorbs, Catalans, Scots, Occitans and other peoples or nations without states have asserted themselves, demanding that their voices be heard and their values, ways of life and myths acknowledged (Iorwerth 1995). The outcome is not simply the fragmentation of the social structure that underpinned European society, but what some have characterized as a 'crisis of identity' (Morley and Robins 1995). The emergence of these 'new' identities in the post-war period represents a challenge not only to the values and myths of European nation states, their identities and consciousness, but also to the development of pan-European identity and consciousness.

Mass media and European identities

The media are seen as playing a central role in how Europeans are re-imagining themselves. There is a close and intimate connection between the media and identity. The media in the post-war period have played their part in giving expression to national identities across Europe (Scriven and Roberts 2003: 1). Broadcasting, film and, to a lesser extent, the press were national in their organization, outlook and output. The 'great newspapers' of Europe claimed more and more to speak on behalf of the nation, address a national agenda or speak out on the national issues of the day. Media policymaking was framed in a national context, formulated by government in keeping with the social customs, attitudes and traditions of the national community. Variations in political structures, economic conditions, language and culture, as well as social mores and attitudes, ensured that national media systems across the continent were distinct. Media consumption patterns reflect the ways of life in different parts of Europe. The division of labour, the organization of leisure, the pattern of the workday, the nature of the education system, the traditions of politics, the ability and capacity to access the media and even the weather are among the factors that have determined the ways in which Europeans consume their media and the kinds of media products that are popular. How Europeans buy their newspapers, the peak times for watching television, the types of magazines that are popular, the practice of journalism, the relationship between the media and politics and the regulatory mechanism for ensuring plurality, fairness and privacy differ from country to country. The most noticeable differences are between Northern and Southern Europe. However, the transformations in European politics, economy and society since the late 1970s have brought about a gradual erosion of these differences.

Some commentators argue that the weakening of older institutions and structures, such as the church, the family and political parties, has strengthened the power of the media to shape our sense of identity (Hallin and Mancini 2004: 263). More crucially, the changes have affected the capacity and ability of the media to reflect and represent national identity on a number of levels. Perhaps it is developments at the supranational level that are most noticeable. The economic and political change brought about by the growth of the EU and the European common market has undermined the nation state and national institutions, including the media. Since its inception in the late 1940s, what has become the EU has promoted European economic integration, which has led to a standardization and harmonization of markets in Europe. Media economic activity and media policy increasingly occur in a European context and are less subject to the whims and peculiarities of national systems. Policies, practices and actions in media markets are becoming 'Europeanized'. Furthermore the decision to embark on the process of economic liberalization and deregulation has opened up national media markets, thereby helping to erode national differences. Since the 1980s and, in particular, the Maastricht Treaty, efforts to develop economic cooperation and integration have been accompanied by moves towards closer political and cultural cooperation and integration. The pace at which national authorities have ceded decision-making power to pan-European institutions accelerated in the wake of Jacques Delors' call for 'ever closer union'. The scale of these efforts has expanded since 1989, with the end of Soviet occupation and control of Eastern Europe. The former European countries of the communist bloc have been freed to rediscover their European identities. The alacrity with which they embraced these identities is shown in the recent enlargement of the EU, which brought several of these nations into the European project. Recent political transformation in countries such as the Ukraine promises further enlargement. The move to greater political integration is controversial in parts of Europe such as Denmark and Britain, where it is strongly resisted. While political integration may be an unimaginable endeavour for some, it is clear that since the 1980s Europe has become 'much closer to its desired unity' (quoted in Halloran, 1993).

The media have been identified by the EU Commission in their efforts to build a unified Europe as a 'crucial tool in the realisation of a European identity' (Bakir 1996: 177). Pan-European media are necessary to foster European integration and unification. As one MEP stated in 1982: 'Information is . . . perhaps the most decisive question for European unification . . . a European consciousness will only arise if Europeans are suitably informed' (quoted in Kleinsteuber et al. 1993: 129). Not all media were seen as playing an equal role in this process. The 'Television Without Frontiers' directive, passed in 1989, stressed the importance of the medium to the process of European cultural and political integration (see Humphreys 1996: chapter 8). Television was regarded as a more influential and less nationally encumbered medium than print; and technological developments, most crucially the advent of satellite broadcasting, made Europe-wide television feasible. By building a European audio-visual space, supporters of the directive saw cross-border, pan-European television programming taking a lead in building a European identity. To realize this aim, the EU set about creating the economic conditions for the development of Europe-wide television, which meant breaking down national media markets that had dominated European broadcasting until the 1980s. Deregulation and liberalization were seen as essential components in breaking down the regulatory mechanisms that protected national broadcasters, and the EU began developing a European media policy which supported the deregulatory steps of national governments. The connection between media deregulation and European integration was made clear in the Bangemann Report in 1994, which stated: 'Competition policy is a key element in the [EU] strategy. It is especially important for consolidating the single market and for attracting the private capital necessary for the growth of trans-European information infrastructure'. The aim was to encourage the enlargement of firms to operate at a European or international level, thereby facilitating pan-European programming. Bangemann also stated that regulation was necessary at the supranational level to ensure there were no regulatory disparities between member states (Wheeler 2004). As a result of the EU's activities, the media were placed at the heart of the struggle to build a unified Europe. We can see at the supranational level that the economic, political and media policies of the EU are loosening national sovereignty and changing the media's relationship with the nation and individual viewers, listeners and readers (see chapters 7 and 8).

If the efforts of the EU represent a top-down approach to using the media to construct a collective identity, pressures from 'below' are as important as those from 'above' in understanding what is happening to the European media. National media systems not only have to react to the supranational challenge of the EU, but also to those forces that are pushing for the devolution and decentralization of European politics and society. These sub-national forces are also having an impact on media structures and output. New social groups, including ethnic groups, women, young people, social movements, regional and sub-national communities, became increasingly critical in the post-war period of the ways in which they were denied access to or marginalized by the media (see Scriven and Roberts 2003). Campaigns for greater access to the airwaves or fairer representation were common in most European countries in the 1970s and 1980s. The result was that national media, in particular TV networks, began to incorporate programming which reflected these groups, communities and identities. Some groups established their own media. Zee TV-Europe is one example of how satellite television is being used to respond to the needs of minority social groups for wider audio-visual representation. Set up in 1996, Zee TV-Europe broadcasts to the South Asian diaspora across Western Europe (Dudrah 2002). Of particular significance to the debate about European identity was the development of regional media across Europe. In the late 1970s and early 1980s there was a huge growth of regional television, which took many forms, from new stations, working for established national broadcasters, to autonomous, independent channels, representing linguistic and cultural minorities (Garitaonandia 1993). The decentralization of the broadcast media represents a different version of Europe: a 'Europe of the Regions', which conceives of European identity in terms of a mosaic of difference and diversity. The tension between this view of Europe and the melting-pot approach of those supporting the development of a common culture and shared European identity is an important factor in shaping the EU's audio-visual policy. The media industries in Europe 'are supposed to articulate the "deep solidarity" of our collective consciousness and our common culture; and, at the same time, they are asked to reflect the rich variety and diversity of European nations and regions' (Robins 1993: 80). For some these views are not reconcilable. Nevertheless, the national construction of Europe's media was identified by both supranational and sub-national forces as an impediment to the development of their objectives and aspirations. Since the late 1970s the European media have contributed to the process of building sub-national and regional consciousness in Europe.

How Europeans imagine themselves is also subject to the spectre of Americanization. Throughout the twentieth century, in common with people in many other parts of the world, Europeans have felt that their cultural identity is being undermined by the relentless flow of American popular culture into their continent. Hollywood, Tin Pan Alley, jazz, rock 'n' roll, comic books, *Dallas* and *Dynasty* and computer games such as 'Tomb Raider' are all examples of American media products that have captured the imaginations and wallets of European audiences. While concern about the impact of American media and cultural products is long-standing, since the advent of television in the 1960s the flow of US material has increased rapidly, accelerating with the arrival of satellite and cable television. This increased flow is not only accompanied by the fear that the growing consumption of American culture is eroding national cultures in Europe and acting as a major barrier to the development of a common European cultural identity, but is also seen as threatening the industrial base of European media and cultural production. The importation of American products is seen as destroying European jobs and companies, making Europe less competitive in the global media markets (see Morley and Robins 1995: chapter 3). The flow of American media products and practices has led to a growing similarity in what people watch, see and hear and the way in which the media in Europe operate. European broadcasters and media executives are increasingly turning to America for knowledge and assistance on how to work in a more competitive and commercialized environment (Hujanen 2000). The EU has justified Europeanization as a necessary antidote to the process of Americanization. The growth of large European media firms and conglomerates is in part seen as increasing Europe's ability to counter US influence and play a role on the world stage. However, the audio-visual policy of opening up national media markets presents the real and clear danger of enhancing Americanization through an increased flow of US programmes into Europe. The market context which is driving the EU's audio-visual policy is not seen by some critics as compatible with expectations of the media's capacity to promote integration (Robins 1993; Schlesinger 1993). This dilemma highlights the importance of the connection between identity and economics in shaping the European media landscape.

Europe's media market

Europe has developed into the largest media market in the world. If you consider the member states of the enlarged EU, together with the population of Russia and the ex-communist countries of Eastern Europe, plus Norway and Switzerland, a potential market of nearly 700 million people exists, almost three times the size of the US domestic market. Several features can be identified in the development of this market since 1980. The first feature is that Europe's media market has undergone a huge expansion.

Europeans and their media consumption habits

Virtually every household in the EU owns a television set, with nearly half of them possessing two or more. Nine out of ten households possess a transistor radio, while almost two-thirds of households are equipped with a videocassette recorder and one-third a personal computer. Every person within the EU watches on average 3 hours and 26 minutes of television per day, broadcast by more than 2600 television channels/stations (Sequentia 1995). They listen to a comparable amount of radio, 3 hours and 11 minutes daily, supplied by over 8000 radio stations (European Music Office 1996). Newspaper circulation per capita is higher than anywhere else in the world. More than 2115 daily newspapers are published in Europe, with a total circulation of 190 million (UNESCO 2003). It is estimated that around 11,000 consumer magazines and 25,000 specialist titles are published in Western Europe (Braithwaite 1996: 97). Europeans are keen film-goers. In 2002 there were over 933 million admissions to the cinema in EU countries (European Audiovisual Observatory 2003). More than one billion units of sound recordings, that is vinyl, singles, CD and music cassettes were sold in 1999. Nearly 60 per cent of Europeans listen to music every day, the vast majority of people listening on the radio (Eurobarometer 2002). A survey of media consumption in the countries which joined the EU in 2004 indicates similar patterns emerging. In stark quantitative terms, the amount of media hardware in European households is impressive, as is the amount of time most Europeans spend on media activities.

Based on data for the member states of the EU prior to enlargement in 2004, media consumption has grown enormously. This growth is fuelled in particular by the development of broadcasting and new media. While newspapers have declined, their electronic counterparts have gone from strength to strength. Driven by technological change and the policy of deregulation, more television channels are popping up all over Europe. According to Papathanassopoulos (2002: 14), the number of channels in Europe grew from fewer than 90 in 1989 to 580 in 2000. The multiplicity of television channels, with many more to come in the wake of the 'digital revolution', is not only accounted for by the arrival of cable and satellite broadcasting. There has also been a corresponding growth in terrestrial channels, the result of governments preferring to develop commercial channels domestically rather than have them imposed from outside. Many of the new channels are thematic, in the sense that they specialize in a particular kind of programming, such as news, music, sport, children, lifestyle, shopping, history, religion, documentary, erotica and wildlife. Thematic channels survive on smaller audiences; as a result, niche broadcasting presents a challenge to the established national channels.

The arrival of these channels has resulted in greater competition in the television market, which for ordinary viewers has expanded the amount of programming they can watch. Television today broadcasts 24 hours, from breakfast television to the late-night film and educational fare of the early morning hours. To fill the increased programming hours, more news, sport, entertainment and drama/serials are being produced than ever before. A similar development has taken place in radio. As television expanded, radio slowly shrunk, to the extent that it came to be seen chiefly as a subsidiary medium of mass communication, to be used when television was not available or accessible (Kleinsteuber et al. 1993: 146). However, the 1980s witnessed a proliferation of commercial and non-commercial radio stations across the continent. New local, city, regional and national radio stations were born, broadcasting a range of material. Most of the commercial stations are primarily music driven – although news, talk and sports stations are growing in popularity – and financed by advertising and sponsorship. At the local level, their links with the local community tend to be limited, with stations forming part of national networks, broadcasting a minimal amount of locally produced material. Non-commercial radio stations, often referred to as 'free' or 'community' radio, tended to be established by individuals or groups, committed to their neighbourhoods, political causes of one form or another or particular social or ethnic groups.

Most of these new radio and TV channels are private, which represents a fundamental shift in the media landscape. The ascendancy of public service channels has been undermined by the growth of these channels. In 1980 there were only three private television channels operating in Europe. For most countries public service monopolies were the norm. By the end of the decade there were more private channels than public, a gap which has widened ever since. Three-quarters of the 580 channels operating in 2000 were private (Papathanassopoulos 2002: 14). Cable and satellite are the primary means by which these channels are delivered to European households. Cable and satellite in many parts of the continent offer better quality reception and provide additional services, such as telephony and internet access. In some countries cable has prevailed – in the Benelux countries, nine out of ten households prefer to watch television through their cable system. Cable accounts for the majority of TV households in Denmark and Germany. Elsewhere the technology has struggled. For example, in Italy only 12 per cent of households have cable (Steemers 2004: 35). Satellite broadcasting brought a flow of programmes into countries from outside their border, from neighbouring countries in Europe and beyond. Channels were set up to bypass national regulation and controls. One example is TV3, which is transmitted from London to the Scandinavian countries. It was established in London in 1990 as a pan-Scandinavian channel in order to avoid the rules and regulations governing advertising in Denmark, Sweden and Norway, which were stricter concerning the amount of advertising, the length of commercial breaks and the advertising of certain products, such as alcohol (Mortensen 2004: 46). If technology has made these channels available, and the relaxation of regulation has assisted their development, to prosper they have had to make money. The new private channels have a different role from their public service predecessors. Driven by the need to maximize their audiences, they see broadcasting as a commodity to be sold to obtain the highest return rather than as a social good which plays a key part in building the social and political order.

Private media are associated with the growth of commercialization or marketization. The early history of mass communication associates the free market with the establishment of press freedom and the emergence of democracy (McQuail: 1998). This positive connotation has given way to the more negative identification of the process with 'the pursuit of profit above all else' (McQuail 1998: 108). This approach to the media has become more prevalent in Europe since the 1980s, subordinating the operation of the media to the interests of private individuals and companies. Opening up the media to the market, and removing rules and regulations that have governed the operation and output of the media, has led to the repudiation of the tradition of public service (see chapter 3). Running the media on commercial grounds has specific consequences. In order to maximize profits, media production is becoming, in McQuail's words, 'large-scale, low cost and low-taste' (McQuail 1998: 108). Private media entrepreneurs have to sell their products and the main method of financing their commercial operation is through advertising. It is possible to sell TV programmes directly through subscription channels and pay TV. However, as the press has found, it is only through raising advertising revenue that newspapers can make a profit;

making money based solely on newspaper sales is almost impossible (see chapter 2). Thus in the new commercial environment private broadcasters can only maximize their profits by increasing audience size while minimizing their production costs. Therefore, emphasis is placed on programmes which will bring in the largest possible audiences, to attract the maximum amount of advertising. Minority tastes are increasingly neglected. The highest rated programmes tend to be entertainment and sport. Commercial media place more emphasis on entertainment than information and education, are more concerned with keeping down costs, which impacts on the quality and range of material offered, cater to the interests of the mass rather than minorities, and seek to reduce financial risk by developing successful formats and recycling popular genres, themes and approaches (McQuail: 1998). While commercial criteria are more prevalent in private channels, they have not been without their impact on public service channels. In order to compete, public television has had to adopt a more commercial approach. Dwindling audiences have forced public broadcasters to develop programming policies similar to those of their private competitors. Failure to do so would make it more difficult to justify public finance. The increasing scope for commercial enterprise in broadcasting is also apparent in other media industries. Commercialization has undermined the rationale for state intervention in the newspaper and film industries. Press subsidies to encourage diversity are dwindling, while film production in many parts of Europe, especially Eastern Europe following the collapse of communism, has virtually disappeared with the decline of government support.

The growing commercial nature of the European media has had an impact on their content. With more airtime to fill, greater competition and the need to satisfy commercial requirements, there has been a growth in the amount of cheap programmes imported from the USA. Sepstrup (1989) has identified a strong correlation between a higher proportion of American programmes on European TV screens and the greater degree of commercialization in the European broadcasting market. From their study of the output of 36 television stations across Europe, de Bens and de Smaele (2001: 68) found that nearly two-thirds of the fictional material broadcast was of North American origin. Private channels tended to broadcast more American programming than public channels. But American influence goes beyond the amount of US programmes on the screen. Many home-produced quiz and game shows are derived from or based on US formats, such as *Wheel of Fortune*, which first aired in America in 1975, to be adapted for broadcast in Britain in 1983, France in 1987 and Germany in 1988, and subsequently in 50 other national media markets (Tunstall and Machin 1999: 30). Other popular US genres to cross the water include the daytime talk show and the reality crime series. The growing US-derived content of European television follows a pattern that has developed in the European film and music markets. Commercialization has facilitated increased US imports. How American imports are adapted for European audiences and how Europeans consume this material does raise questions about the influence of US media products and the extent to which European audiences are being Americanized.

Commercialization is also seen as responsible for the 'dumbing down', 'tabloidization' or 'boulevardisierung' of European television and media in general. While there is some debate about the exact nature of what is meant by tabloidization (see Esser 1999; Bek 2004; McLachlan and Golding 2000), broadly it refers to two trends: the growth of entertainment at the expense of information in the media, and the incorporation of entertainment values in information and news. Serious content, including politics, news and current affairs, is being either cut back or diluted to reflect the market demand for more entertainment. Specifically it means more human interest stories, less political coverage, fewer international and more local stories, hard news being replaced by sex, scandal and celebrities. This change in content applies to both the press and television, although the process is something which has only begun to occur in broadcasting over the last two decades. The extent and impact of entertainment taking priority and the rise of 'infotainment' is open to debate. Defenders of the changes argue that by making politics and news more entertaining the media are reaching people who would otherwise not be interested and 'giving the audience what they want' (see Klein 1998; Brants 1998; Brants and Neijens 1998). Critics believe they are contributing to growing political cynicism, increasing public knowledge of current affairs and encouraging mistrust of government and politicians (see Schulz 1997, 1998).

Changes in the content of the media must be seen in the context of the changing nature of media regulation. Regulation has been seen as an indispensable part of the media environment in western liberal democracies, even by those who are strong supporters of the free market. Autonomous bodies, such as Conseil Supérieur de l'Audiovisuel (CSA) in France or even the Federal Communications Commission (FCC) in the USA, have ensured that broadcasters are accountable to the public for what they report and represent. Similarly, Press Councils operate in various European countries to oversee the standards and performance of the press. Other mechanisms operating to the same end include journalistic codes of practice and right of reply and privacy legislation. Such regulatory devices in Europe have always been stronger in the broadcasting sector. The precise nature of regulation reflects the different economic conditions, attitudes to individual rights, political traditions and cultural sensitivities in each European country. Since the 1980s the trend in every European nation has been to lighter-touch regulation. In the name of encouraging economic efficiency and making Europe's media more competitive, the rules and regulations overseeing the content, obligations and duties of the media industries have been weakened. Less media regulation at the national level has been accompanied by the development of regulation at the supranational level (Wheeler 2004). This has led some to argue that what is happening is not deregulation but re-regulation, which is reinforced by the fact that no nation has abandoned media regulation completely.

New forms of media regulation are a response to the technological, socio-economic and political changes that are taking place. Above all, they reflect the rapid and radical transformations in technology. Digitalization is bringing about the rapid convergence between media and communications systems. In the analogue world each medium developed separately, with its own technologies, methods of production and distribution systems, which were for the most part incompatible with each other. Digital technology is merging technologies used in broadcasting, telecommunications and computers, and offering a variety of possible new uses and applications (de Bens and Mazzoleni 1998; Chalaby and Segell 1999; Murdock 2000). The old regulatory arrangements were based on separate consideration for each media form and each sector of the communication industry. Breaking down the barriers between media and communication services has posed huge legislative and regulatory dilemmas (Østergaard 1998). Convergence also promises to reconfigure the content of the media by bringing together all the major forms of expression in one place, as well as enabling users to interact with the new media and personalize their consumption of the mass media (Murdock 2000). The internet is a new form of mass communication, bringing together interpersonal and mass-mediated communication (Truetzschler 1998). For most Europeans it promises to revolutionize their interaction with the media. However, the claims made for the new medium, such as its democratic and emancipatory potential, are still a long way from being realized, as most Europeans still prefer to watch television and read their newspapers than surf the net.

Europeans on the internet

From the mid-1990s the growth of computer-related technologies in Europe has outstripped the growth of other communications technologies. The number of Europeans with access to a computer rose rapidly in the 1990s, resulting in the internet moving 'from the margin to mainstream in Europe' (Norris 2000b: 3). Yet today the majority of Europeans do not use a computer. A survey of European media consumption patterns found that nearly 54 per cent of those surveyed never use a computer and only one in three regularly access the internet (Eurobarometer 2002). This means the internet has some way to go to challenge the traditional means of information and entertainment retrieval in Europe. Europeans prefer TV, national and local newspapers and radio to the internet. There is also a north–south divide as in terms of access to and usage of the internet. The proportion of people using the net is highest among Northern Europeans, especially Swedes (66.5 per cent), Danes (59.4 per cent), Dutch (53.8 per cent) and Finns (51.4 per cent), and lowest among Southern Europeans, where only 14.8 per cent of Portuguese and 15.1 per cent of Greeks are users. These differences are explained partly by socio-economic factors, but with relatively affluent countries such as France and Germany low on both counts, they do not fully account for the differential take-up of the new media. Norris (2000b) identifies other factors, such as the size of the service sector, the spread of higher education, literacy, language and government policy. A large service sector facilitates access in the workplace. English is the language of the internet, and countries with a greater familiarity with the language would be expected to show higher usage. The new media have so far simply reinforced the traditional north–south divide in Europe's traditional pattern of media usage. It is also the case that the internet appeals disproportionately to the affluent, the educated and the young.

Finally, digitalization is fuelling the formation of new media corporations seeking to take advantage of the convergence of media sectors. Industrial convergence is creating giant media conglomerations, whose growth represents not only the changing nature of media ownership, but also the decrease in the number of firms that own and control Europe's media market.

Changing nature of ownership

If national government and public media organizations were the main actors on the European media landscape prior to 1980, today's primary movers are large corporate 'empires' or 'media moguls'. Their economic activities are no longer contained by national boundaries. Their operations are less constrained by rules and regulations. Their commercial needs lead them to standardize their products. Their power and influence are a major determinant of the contemporary media landscape. Since the early 1980s these firms have come to dominate the media in Europe. The large number of television and radio channels brought into existence by deregulation and liberalization is controlled by an increasingly small number of media conglomerates. Berlusconi, Murdoch, Hersant, Springer, Messier are the names of but a few of the media moguls whose firms have exploited the changing media environment to amass more and more of the press, broadcasting, film and music industries across Europe. Unlike the press barons of Britain and North America, their European counterparts developed more slowly, but today Europe's media moguls have been propelled into positions of influence and power almost unparalleled in the history of mass communication. Of the world's top 50 media companies, half were European; eight in Germany, seven in Great Britain, four in France, three in Italy, two in the Netherlands and one in Luxembourg (Meier and Trappel 2000: 48). Some of these groups have a long tradition: Havas and Hachette in France and Bertelsmann in Germany can trace their origins back to the 1830s, while others, such as Silvio Berlusconi's Mediaset, have emerged in the last two decades of the twentieth century (Mazzoleni and Palmer 1992: 26). All have extended their power and influence as a result of the transformation of the European media.

The emergence of mega media corporations is based on an 'unprecedented wave of mergers, acquisitions and partnership agreements' (Mazzoleni and Palmer 1992). To exploit the potential monetary rewards offered by the newly liberalized broadcasting markets and compete in a climate of rapid technological change, media firms have had to expand and adjust to maintain themselves. Today's media empires are involved in a relentless search for markets. Competition and financial considerations, such as the escalating cost of media production, mean that firms must continue to grow and expand. Large-scale production is everything as it assists firms to cover their costs, minimizes their risks and makes them competitive. For European firms lacking the language advantage and market share of their US rivals, growth has become essential. Hachette's chief executive states that 'if you're involved in advanced technologies, you have no choice but to diversify and internationalise' (quoted in Mazzoleni and Palmer 1992: 34).

The mergers, takeovers and partnerships that have been the primary means by which Europe's media empires have expanded have not been without their problems. Empires can fall as well as rise, as Europe has seen in the case of Kirsch. The 47-year-old Munich-based group filed for insolvency in 2002, with immediate debts of around 6.4 billion euros (*Financial Times* 2002). Kirsch's intervention into the pay-TV market was costly, losing the company 2 million euros per day during 2002; together with a downturn in the German media market, this resulted in the group's collapse. Vivendi is another European conglomerate which got into difficulties. Under the leadership of Jean Marie Messier, Vivendi (which started life as a 149-year-old French water company), added a crateful of media assets, including Universal Studios and other US media operations, and was thereby transformed into one of the largest media conglomerates in the world by the late 1990s. Rapid expansion hit the buffers in 2002, following problems in the pay-TV part of Vivendi's diversified entertainment empire, compounded by disagreements within senior management and injudicious comments by Messier to the effect that defending French culture was of no interest to him and his company. The experience of Kirsch and Vivendi highlights the fact that the media empires of the late twentieth century were often built on shaky foundations; in Picard's words, they are not necessarily 'permanent and omnipotent' (Picard 1996).

These media empires are characterized by several features that single them out from the previous companies that had owned and controlled Europe's media. These firms are international in scale. Companies such as Bertelsmann own media assets around the world, including in the USA. Even medium-size companies in Europe operate in several countries. The German WAZ Group owns media in Austria, Switzerland and several Eastern European countries, while the Finnish publisher, Sanoma WSOY, is the largest media group in the Nordic region, with interests in the Netherlands (following its purchase of the country's oldest and largest magazine publishers, VNU, in 2001), as well as the Baltic States, the Czech Republic and Hungary (Kelly et al. 2004; International Federation of Journalists 2003). Sweden's Bonnier Group, which controls over 25 per cent of the newspaper market in Sweden, has a presence in more than 20 European countries (International Federation of Journalists 2003). Ownership of the European media is no longer national in reach. It is also increasingly cross-media in nature, as firms diversify into a variety of sectors of the media industries. Previously confined to particular media, primarily as a result of regulation, which prevented newspaper groups owning more than a certain share of the broadcasting market and vice versa, firms have extended their ownership across the media industries. Mediaset owns television in Italy, Spain, France and Germany, as well as newspapers, magazines, journals, advertising firms, film production and distribution interests, a video rental company, telecommunications operators, internet and teletext services and mobile phone companies (International Federation of Journalists 2003). Sanoma WSOY has interests in newspapers, magazines, book publishing, broadcasting, multimedia, a photo agency, business information services, cinema and film distribution, internet and video sales and rentals.

Most of Europe's media firms have also diversified into other areas of business, industry and finance. Media production often forms part of broader industrial concerns with other interests. They are no longer simply media empires. Many companies have bought into the media industry as perceptions of their profitability have risen. One example is Berlusconi's empire, which started as a property development and construction company. Deregulation led him into the media, and success led him to diversify his operations into businesses as diverse as life insurance, pension funds, sporting ventures – such as AC Milan football club – department stores, restaurants and supermarkets. The range of influence is such that the term 'Berlusconism' has been coined to describe 'a way of life in which people live in houses built by Berlusconi . . . watch television controlled by Berlusconi, shop in supermarkets owned by Berlusconi, eat in restaurants built by Berlusconi and relax on Berlusconi tennis courts or watch his soccer team' (International Federation of Journalists 2003: 24).

The Italian experience is replicated in other European countries, as media ownership ceases to be located in family concerns specializing in a particular form of media production and distribution and is integrated into the heart of financial capital. This development raises questions about the independence of the media from the business sector, fear of which is accentuated by the concentration of ownership of these media giants. Growth, deregulation, internationalization and diversification have whittled away the variety of firms who have owned and controlled the European media. Concentration was first noticeable at the national level. In the mid-1980s, as the leisure sector grew, there was a general trend to the centralization of control of every sector of the media. The top three, four or five companies came to own an increasingly larger share of their respective markets, and through cross-ownership the domestic media in Europe were subject to the growing political and economic interests of a few media moguls. This trend is now apparent at the European level as these firms grow out of their national markets and seek to exploit the liberalized media markets across Europe and beyond. Some perceive the enlarged influence of these firms and their owners as a potential threat to democracy.

Euro media conglomerates

Two European media conglomerates that have become major players on the worldwide stage are Bertelsmann and Vivendi.

Bertelsmann is the largest media enterprise in Europe and one of the world's top ten companies. Bertelsmann began life as a publishing and printing company in the nineteenth century. It has a controlling interest in Europe's largest TV and radio group, RTL, with 24 television stations and 14 radio stations in 10 countries. RTL produces around 10,000 hours of programming annually. It owns content production companies in several European countries, including Regent and Thames Talkback in the UK. It owns more than 100 magazines and newspapers in 14 countries, including France, Spain, Italy, Austria, Russia, the Netherlands, Germany and the USA. Its publishing arm extends across the world and includes Random House, one of the top five publishers in the world, a book club with 28 million members and a scientific and technical subsidiary which owns over 700 trade magazines. Bertelsmann Music Group operates in 54 countries and owns over 200 labels, including RCA.

At the height of its success, in 2002, Vivendi Universal was valued at $55 billion. It started life as a French water company, Compagnie Générale des Eaux, changing its name in 1998. In the same year it merged with Havas, France's largest books publisher and business information provider, and in 2000 it joined with Canal Plus and the Canadian media and distilling company, Seagram. Its music group includes, among other record labels, MCA, Decca, Polygram, Motown and Deutsche Grammophon. Its has a large stake in telecommunications companies in France, as well as a mobile phone network and phone services in Europe and Africa. It was Europe's largest trade publisher until 2002 and owns newspapers and magazines such as L'Express, L'Expansion and La France Agricole in France, and Spain's leading paperback publisher, Alianza Bolsillo. Through Universal it owns television, cinema, video and video games companies. Universal TV Group owns US cable networks, such as Newsworld International. Ownership of numerous pay-TV companies comes through Canal Plus. In 2002 financial problems led to the departure of its charismatic chief executive, Jean Messier, and some of its media interests were sold off.

Are changes in ownership harmful?

There is considerable debate within most European countries concerning the effects of the extension and concentration of media ownership. Should European societies fear the influence of the media moguls and their media empires? Some commentators emphasize the economic advantages of such enterprises. They argue that the economies of scale of large-scale production bring benefits to consumers in the form of a wider range of products of better quality at lower costs. Using the less pejorative term 'consolidation', they talk of the synergies of large companies which support creativity and allow for the cross-promotion of their products (see *Economist* 2002: xx). Critics point to the negative effects, including the loss of political, intellectual and cultural diversity. The variety of ideas and opinions, they argue, will be reduced as a result of the concentration of ownership. Control over the process of production is also seen as having the potential to lead to standardization in both the cultural content and format of the product (Humphreys 1996: 73). Too few owners also raises the question of political bias. Humphreys (1996: 74–5) identifies several ways in which powerful media groups have exerted pressure on politicians and the political process. First, political bias is seen as having an influence over the outcome of elections. He cites as examples Murdoch's support for Mrs Thatcher and Tony Blair and Springer's support for Helmut Kohl and the right-wing coalition at the 1994 Bundestag elections. Second, media moguls are seen as using their influence to change public policy on issues of national concern. Third, owners and editors have exerted indirect influence by 'playing on the natural sensitivities of politicians about how they are represented in the media'. Fourth, they determine who gains access to the media, and finally, they can attain a position of influence at the heart of decision-making inside political parties and governments. For example, Robert Hersant became a Gaullist member of the National Assembly in France, along with 11 of his employees (Mazzoleni and Palmer 1992: 145). More significantly, Silvio Berlusconi used his media power to become prime minister of Italy – twice.

Berlusconi's rise to political office is seen as the ultimate example of the power of media moguls. He is Italy's 'Mr Broadcasting', coming to prominence with the deregulation of Italian broadcasting in the mid-1970s (see chapter 3). A highly successful building entrepreneur, he acquired a monopoly of private television. His ability to attain this position was assisted by his close relationship with the socialist prime minister, Bettino Craxi. In 1984 Craxi overturned a court order which stopped Berlusconi from broadcasting, and in 1990 pushed through legislation which confirmed his private monopoly of commercial television. Today Berlusconi's company, Mediaset, owns three channels, which have a 45 per cent audience share and 60 per cent of total advertising. Up until 1992 Berlusconi played the 'normal' role of a media tycoon who 'lurks behind politics, but is not in politics' (Ginsborg 2004: 57). The events of 1992 propelled him into politics. Corruption charges levelled at senior politicians of all the established parties brought down the Italian political system and the power of the elites who had controlled it. Former prime ministers were called to account and Berlusconi's protector, Bettino Craxi, fled abroad, where he was to die eventually. National collapse was accompanied by a personal reversal of fortune. Diversification into the retail business and the purchase of the pay-TV channel, Telpiu, had proven disastrous (Ginsborg 2004: 64). With profits tumbling and political stability crumbling, Berlusconi took the plunge into Italian politics.

Setting up a new political party, Forza Italia, Berlusconi fought the 1994 elections as part of a right-wing alliance, achieving a remarkable victory. Forza Italia obtained 21 per cent of the vote and Berlusconi became prime minister. The techniques used in Berlusconi's campaign, especially his use of the media – television, in particular – are regarded by some scholars and commentators as crucial to his success. The media mogul's entry into politics is seen as turning the Italian political system into a 'videocracy' (Mazzoleni 1995). His party was only four weeks old when it attained power; the formidable 'media armoury' he brought onto the electoral battlefield is seen as decisive in promoting the new political party. Forza Italia was a new development in Italian party politics. Described as a 'media-rooted party' it had no policy baggage nor bureaucracy, and loose ties with the voters. It only served to 'amplify its leader's message' and was dependent on the media to reach the electorate (Mazzoleni 1995: 302). Using his marketing and advertising firm, Pubitalia, Berlusconi polled Italians to find out their likes and dislikes, packaged his party accordingly and promoted Forza Italia through his media. According to some commentators, the result was 'a populist message, delivered in an appealing and persuasive style' (Mazzoleni 1995: 303). Opponents were denied access to his channels as he and his party tied up the airwaves. The message for some was that Berlusconi's media power had delivered him into political office. The balance between the media and politicians had changed for ever.

Berlusconi's first term in office did not last very long. Dissent within his coalition led to his resignation in December 1994. However, this did not mark his departure from politics, even though many at the time believed his political career was over. His defeat at the 1996 elections seemed to confirm this and repudiate the videocracy thesis. Between 1996 and 2001 he rebuilt his party and put his business interests back on a sound commercial footing. His coalition won the 2001 election easily. Research shows that he and his campaign were an overwhelming presence on his own channel and the public service channels (Ginsborg 2004: 95). As prime minister, he now controls 90 per cent of Italian television, the main source of information for 80 per cent of Italians. Mediaset receives its licences to operate from the state that he heads up (European Federation of Journalists 2003). Since becoming prime minister, Berlusconi has acquired additional media interests and done nothing to resolve the conflict of interest between his media power and political power. Instead he has exploited the situation to extend his control of the media. Presenters known for their opposition to the government were dropped by the public service broadcaster, RAI, only months after they were criticized by Berlusconi (Cozens 2002; Fisk 2002). RAI also banned a special edition of the satirical programme *Blob* on Berlusconi's attempt to bring the state broadcaster to heel (Reporters Sans Frontiers 2002). The programme referred to the efforts of the prime minister to pack the RAI board with his own followers. In 2003 he finally got his way. Following the resignation of the board, some of whom objected to the prime minister's 'non-stop occupation' of their work and the lack of respect shown to news diversity, Berlusconi appointed the members of the new board, in an act of unprecedented interference (Reporters Sans Frontiers 2003). In 2004 he attempted to bypass the nominations system again to have the head of McDonald's in Italy appointed president of the board (Arie 2004). Dissident voices in Italian society have virtually disappeared from television screens since 2001. According to Paul Ginsborg (2004: 113) the 'multiple associations of Italian civil society simply do not exist, except when they become of such proportions that they cannot be ignored, as with the European Social Forum's peace march in Florence in November 2002'. RAI's ratings have fallen since 2001. In January 2004, Mediaset's channels surpassed RAI's rating in prime time for the first time (Arie 2004). The public service broadcaster's deficit has risen and the claim is being made that Berlusconi's government is trying to put RAI at a disadvantage *vis-à-vis* Mediaset (Reporters Sans Frontiers 2003). The unparalleled concentration of the political and media power in a single person's hands has led the president of Italy to call for legislation to 'better guarantee the fundamental rights of the opposition and minorities by means of press pluralism and impartiality', without which 'there is no democracy' (Reporters Sans Frontiers 2003). Attempts to introduce media ownership laws have failed.

Berlusconi's rise to power in Italy is seen as an example, albeit an extreme one, of the dangers of the concentration of media power in the hands of one person or organization. However, the extent to which media determine people's political loyalties and opinions is open to debate (Mazzoleni 1995; Roncarolo 2002; Ginsborg 2004). The success of Forza Italia in the last decade has as much to do with social and political changes inside Italy – such as the introduction of a new voting system in the early 1990s, the collapse of public trust in the political elite, the discrediting of the established parties and the rise of regional discontent – as one man's hold over television. Some commentators argue that Berlusconi's rise must be placed in the context of the failure of the Italian political system (Roncarolo 2002: 82). He was able to exploit the 'vacuum left behind after the fall of the First Republic' (Mazzoleni 1995: 311). Unlike Berlusconi, media moguls in Europe are happy to exercise their influence behind the scenes. Many have a personal approach to politics, favouring relationships with individual politicians, rather than involvement with political parties or causes (Tunstall and Palmer 1989: chapter 5). The motivations of media moguls vary enormously. Prestige, profit, propagandizing and political influence are some of the reasons to build a media empire. Some see the driving force behind the expansion of Europe's media empires as commercial, stating that control by an individual tycoon or entrepreneur is becoming less common as 'men in suits' take centre stage. Individual chief executives, such as Messier at Vivendi and Thomas Middelhoff at Bertelsmann, are seen as more typical of those who run media conglomerates. Interested in making money, they adhere to a strictly commercial agenda, leaving their employees alone editorially, as long as they are maximizing profits; while they, in turn are left alone by the owners who reap the monetary rewards. If they set themselves up as bigger than the organization they can incur the displeasure of their employers and shareholders, as both Messier and Middelhoff found out when they lost their jobs. While media moguls such as Berlusconi, Hersant and Murdoch are increasingly happy to let managers oversee the daily operations of their media empires, they exercise the final say. They appoint managers, define the structures within which journalists, producers and editors work, determine the strategy and control the investment and finances. Public standing and private influence count as much as financial acumen and profit maximization in their ability and capacity to acquire and control media interests.

Conclusion

The changing nature of the media in Europe is creating what some have labelled a 'new order', characterized by a huge increase in the amount of media, less government regulation and intervention in the media, the decline of public monopolies and the notion of public service, increasing scope for commercial enterprise and private ownership, the tabloidization and Americanization of media content, the convergence of media and communications and the growing influence of a small number of media conglomerates and entrepreneurs (McQuail 2004: 2). European media are big business, with the communications and media industries among the most vibrant and productive areas of most European economies. Satisfying and shaping what Europeans see, read and hear is the responsibility of a continually decreasing number of firms that grow ever larger, with potential consequences for democracy and economic development in Europe. The future of the European media is increasingly in the hands of these corporations. One crucial question is the extent to which the new order is bringing about the Europeanization of the media and encouraging the development of a greater commonality in the practices, output and performance of the European media. This is a matter for discussion as we explore a variety of media sectors in the following chapters.