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1.0. Europe and the new media system

What is the future of the audiovisual media in Europe? And what could be the role of Europe in the new media system? What will be the new Europe of communication? And what kind of communication will Europe need in the years to come?

With a view to answering these questions, which are not by any means either symmetrical or converging, it will be as well to take a step backwards and examine the decade just behind us.

1.1. From separateness to complexity

The 'eighties represented a decisive period in which there got under way a process of transformation that is now reshaping the media system.

Following a long period of slow consolidation in which traditional television acquired a central position, while yet leaving some autonomous (though inevitably redimensioned) areas, the cinema among them, all the indicators began to rise steeply. The turnover of the media industry increased, and so did advertising investments and the size of the groups involved. Image consumption, above all, kept going up: in the United States, expenditure in this field passed from about 27 to almost 52 billion dollars (+90%) between '82 and '87, while the hours of television transmissions in the EEC touched 250,000 in '87 and are expected to reach 400,000 by '92.

Here we are not only concerned with a quantitative revolution, but rather with an in-depth change that is gnawing even the constitutive elements of the traditional system configuration. Indeed, all the levels of the cycle that leads from production to consumption have now become involved in the peculiar dynamics of a radical evolutionary passage. And thus we can see not only the signs of crisis, which keep multiplying, but also a long series of new protagonists - from cabled television to home video and satellites - who claim their place on the stage of the medias.

It is not by any means easy to find one's bearings in this evolving scenario and to pinpoint the trend lines, not least because the differences of context, markets, resources and socio-cultural dynamics inevitably reflect in the modalities of the change. Nevertheless, as we look at the United States and Europe, we can note the elements of a general change that:

- following a phase of incubation, is now accelerating to attack protected zones, enlarge the area of communication and sweep away existing barriers and separations

- proceeds along the twin road of integration and diversification, even though it sometimes sees its forward thrust impeded by different speeds, viscosities and resistances, some of them due to particular economic, social or political dynamics.

One therefore seems justified in suggesting that the explanatory framework may be that of a passage from a phase founded on the model of separateness - in systems, languages, technologies and national markets - to a phase distinguished by complexity and structural interchange.

1.2. European identity and communication system

What is the state of Europe on the eve of its encounter with the new media system?

The old continent, too, seems to have been swept away by the maelstrom of transition. The process of economic and political unification is forging ahead and seems to be creating conditions in which the dialectics of history, for many centuries at work to compose and decompose our diversities, will at long last find the stability of an enduring synthesis.

But the process is far from being unilinear. Friction keeps making itself felt, together with backward rushes, irreducible differences resist and, above all, the settings assume different shades as contexts hitherto separated by ideologies and international orders that have their roots in history are becoming superposed: the composite area of Eastern Europe is opening and, albeit with less clamour, pressure from the South is steadily building up, especially as far as the North African countries are concerned.

Though necessarily brief and summary, these observations are quite sufficient to underscore the mobility of the general framework and make us realize the complexity of the interference system that mediological development must contend with: though the growth of the media predisposes them for playing a fundamental role in pushing ahead the unifying trend in Europe, the mobile and highly articulated panorama of the continent cannot but reflect in the nature of the system of communication, in the peculiar features and the degree of autonomy of its evolution.

No matter what the characteristics of the scenario of the 'nineties, there can be no doubt that the very multiplicity of the variables in play excludes the recurring temptation to indulge in some dogmatic simplifications, including:

- the "American destiny", namely the conviction that Europe must automatically travel along the road indicated by the United States and that the problem is solely and exclusively that of our delay or backwardness with respect to that model;

- the "European fortress", which is nothing but the illusion that oases protected by artificial barriers can be isolated in a system that has become globalizing on account of technological integration and the scale of competition.

In this type of scenario, then, we shall now try to define an area of mediological development by seeking greater insight into a series of antithetical couplets that exemplify differences and/or contradictions at work and also numerous interacting but not by any means coincident levels:

- horizontal/vertical
- international/local
- unification/differentiation
- broadcasting/services
- public/private.

As we consider and accumulate these couplets, we shall gradually delineate some possible scenarios and see how the European dimension can be resolutive as far as each of these antinomies is concerned.

2.0. Antinomies for a scenario

Following the order in which they have been listed, we shall now try to illustrate this series of oppositions preparatory to a definition of the European communication scenario for the next decade.

2.1. Vertical/horizontal

The vertical organization of the production compartments, a classical feature, tended to become redimensioned during the course of the 'eighties.

Though technological separations persist between the devices of entertainment and information, electronics can be seen ever more clearly as a general technology, a kind of common motorway running through compartments that were traditionally deemed to be autonomous and which, rather, tended to justify their separation on the grounds of the incompatibility of their specific technological characteristics.

Electronic technology is thus becoming a unifying script, capable of transporting data, sounds and images. In other words, it is affirming itself not only as a technology that rationalizes and perfects the production processes derived from the mechanics of classical industrial civilization, but tends to deprive the supports of the various audiovisual products of their specificity and to reorganize the succession of the phases that, historically speaking, have distinguished the "analogic" production mode of photography and the cinema. May two examples suffice to illustrate this:

- Though the electronic image has long since become a protagonist in all parts of the cinematographic production process, the advent of high definition has shown that it can compete even with the visual quality of film, thereby creating the conditions for an "electronic cinema" market.

- Thanks precisely to this transversal aspect, electronics have made it possible to realize products that are structurally multimedial - the videodisc being a case in point - and therefore capable of combining audiovisual plenitude with the interactive features of the informatics technologies.

And then we have a general framework that in one respect constitutes the background of these changes, and their point of arrival in another: the industrial system and the communication system are becoming ever more closely bound to each other and the strategies of the latter tend to influence constitutively also those of the former.
In Europe one has to note a lack of harmony and even friction due to the development differences between these two compartments and their different rates of internal evolution. At times one finds individual industries in the van, at others it falls to the communication specialists to be the first to grasp the trend of international competition. Almost always, however, the two compartments have moved ahead without any strategic links between them.

Nevertheless, today one can at least report some experimental initiatives based on a structural encounter of the various levels, in the high definition field for example, that have made it possible to acquire some avant-garde know how.

The steps forward made in this sector show that technological innovation does not follow predetermined and univocal channels, but tends rather to be influenced and guided by particular social, political and economic contexts.

In any case, structural interconnection on the production side has its counterpart - as will be shown - in a parallel integration of enterprises at the financial and marketing levels. It is therefore essential to establish a dense network of relations between hardware and software and between individual countries. And there is only one possible scenario for this: the European one.

2.2. International/local

The combined effect of the propulsive drive of innovation and integration is also to be found at the broadcasting level. At this level, moreover, technological transformation is now ushering in some entirely new modalities, among them - above all - satellites and cabled television.

A few figures will explain the reach of these changes.

In the United States, for example, as many as 45 million tv homes were connected via cable by the end of '89, and forecasts are that this figure will rise to 55 million in '92 - more than 50% of all households.

In Western Europe, again, CIT-Research calculated that in '89 14 million families were able to receive at least one tv station by cable (11% of the tv homes) and forecast a slow growth that should bring the total up to 17% by '97.

The difference is therefore very appreciable and the causes must obviously be sought in the past development of the media: ever since the birth of Hollywood, the United States media could base themselves on a large home market that made possible the growth in good time of a system subdivided into large national networks and local stations that subsequently proved capable - as we shall see - of fully exploiting the opportunities offered by the differentiation of the distribution technologies.

In other words, the compactness of the national market furnished the platform on which it proved possible to construct both an international hegemony and an internal articulation. In Europe, on the other hand, national fragmentation not only created obstacles to the constitution of a transnational and globally competitive dimension, but also ended up - as often proved to be the case - by engendering head-on clashes between policies in support of national markets and sporadic attempts of integration.

Today, however, this picture is changing.
Though slowly, cabled television is growing in Europe, propelled by the retransmission of the national networks in foreign countries and by the interest shown in some pan-European channels transmitted by means of distribution satellites.

The latter must not be confused with another emerging family: that of the direct broadcasting satellites, whose underlying technology creates a potentially supranational distribution network by making it possible for individual users situated in a very large area to receive these broadcasts.

All the principal countries in Western Europe - from France to Germany, from Italy to the United Kingdom, to Spain and the Scandinavian countries - have either equipped themselves in this field or are about to do so, even though it remains difficult to make precise forecasts as to how long it might take before a "Television without Frontiers" in DBS will assert itself in Europe.

Market unification in Europe may well receive decisive forward momentum from these satellites. It is not by chance that they are receiving far less attention in the United States, where their potential function is already being performed by the national networks.

Put in a nutshell, then, side by side with the hitherto exclusively national dimension of broadcasting, one can now glimpse in Europe the first signs of an internationalization of the system:

- the satellite-cable transmission system and, even more so, the direct broadcasting satellites are working to break down the geographic limits into which the institutions have hitherto constrained radio and television broadcasting without any technological reason: even from this viewpoint, therefore, the new strategic market horizon is that of transnational communication

- this tendency is further enhanced by the possibilities that technology offers of making these telecasts multilingual either by means of subtitling with the teletext systems or by using the new multi-audio standards made available by DBS.

To underscore the complexity of system development, one should however note that this accentuated internationalization does not automatically imply a crisis of the other levels of communication: in this case, once again, the growth of the media seems to prefigure an integrated scenario in which it will prove possible to satisfy - by cable, for example - a growing local communication demand. If anything, one may foresee that in the long term it may well be the national level - which will remain central for some years to come - that will have the greatest problems of adapting to the new conditions.

To conclude this paragraph, we can therefore say that the articulation of the distribution technologies can offer a base - essential though not of itself sufficient - for a communication system capable of interweaving positively with the ongoing process of constructing a continental identity.

2.3. Unification/differentiation

The tendential differentiation of the distribution modalities also has its repercussions on the supply characteristics in the present-day panorama. Until a few years ago, the supply via ether, circumscribed as it was within national limits and consisting only of a few channels (at the beginning of the 'eighties there were no more than 45 in the entire EEC), was distinguished by its substantially homogeneous character that had to be tailor-made to suit the tastes of a very wide general public.

The situation is altogether different today. A decisive element of this transformation was constituted by the diversification of consumption and its underlying technologies.

The process commenced when growing social complexity, the availability of new resources and the central position assumed by communication in company strategies facilitated and, indeed, ensured the success of commercial television. This created the conditions for a multinetwork programme supply and led to the gradual breakdown of the broadcasting rigidity, not least from a technological viewpoint, that had been characteristic of the public services.

The remote control devices for our television sets were nothing but the technological expression of this aperture that, against the background of the new relationships between leisure time and working hours, has lined up an entire series of new products for individualized audiovisual consumption.

Outstanding among these new products, at least to judge by its rate of penetration, is the videorecorder. At the end of '89, it had already found its way into 60% of the tv homes in the

States, and even in Europe was close to 50%. Even as of today, the cinema industry has a greater income from home videos than from the cinema circuits, and this fact prefigures new and wider possibilities of marketing tv products.

Pay-tv merits a few words of its own. The advent of encrypted tv signals has brought in its wake the possibility of distributing -through the ether, to be sure - tv programmes that can only be seen by those prepared to pay for them. In Europe this modality has so far been retarded by the continuing popularity and large supply of the traditional "generalist" programmes, the cost of the necessary equipment and concern on account of the number of users needed to reach break-even point. But this situation, too, is about to change.

An irreversible trend is therefore transforming the traditional television set into a videoterminal to which the user can connect either a videorecorder or a computer and which is therefore capable of receiving transmissions via cable and/or satellites.

If this is the general reference picture, one must nevertheless mention some significant differences between Europe and the USA.

The different penetration of cabled television in Europe and the USA is explained - as we have already pointed out - by the continuing centrality in Europe of traditional broadcasts via the ether, which is therefore becoming subject to a supply specialization that in the United States tends to be concentrated on cable tv.

Given these conditions and the intermeshing with a society that is becoming ever more characterized by mobility and microsegmentation, one can visualize the strategic lines of a new programme supply capable of:

- articulation and diversification at the transnational, national and local levels

- making good use of the horizontal media integration possibilities: here one need only think of a film that commences its itinerary in the cinema circuits, subsequently passes into the home video market, becomes distributed by a pay-tv, and eventually arrives at the "old telly", or of the direct broadcasting satellite, which offers a technology that is not only structurally supranational, but also polyfunctional in quantity and quality (in fact, it can transmit general, aimed or encrypted tv, monothematic programmes, "high definition" programmes, and simple sound broadcasting)

- maintaining not only unifying levels, but also specializing in such a way as to profit from the fragmentation of the public: satellite and cable, together with pay-tv and home video, prefigure a target-group market in Europe and a programme supply that will become diversified in kind and services, create new consumption hierarchies and cut across the traditional verticality of the social classes.

The strength and vitality of this process has yet to be ascertained: what market levels will a unifying transnational supply be able to attain and at what speed is the diversifying trend going to forge ahead?
Various factors will determine the answer to these questions: a great deal will depend on the integration levels of the national markets, on the capacity of coagulating transnational advertising resources and on the establishment of norms and regulations, these -too - at the European level.

2.4. Leisure time/services

Within the new supply, the trend that is redimensioning the generalist level goes hand in hand with the ascent of the market of the socalled "new services", i.e. the new use functions of audiovisual communication.

Indeed, the ductility of the new technologies not only tends to pass across the rigid separations between leisure time and work time, but turns the circulation and processing of information into the central element of the organization of labour and society.

More particularly, the possibility of transmitting data in the line interval of the television image makes it possible to plan a supply of information linked to the practices of daily life, to the demand for entertainment and to work, and to tackle the problem of "ongoing education" caused by the rapidity with which knowledge becomes obsolete.

The European public services have begun to commit themselves in a sector of natural expansion, from televideo to encrypted transmissions for specialized users, from radio-telesoftware to the radio-data system.
One may expect that in the years to come this area will contribute to displacing the traditional profile of the broadcasters even further, and that this strategic line deriving from "television" will merge with the one that has its origin in the growth of the telematic hard- and software industry.

As far as targets are concerned, even though these services often develop at the local level, it is becoming more and more obvious that new opportunities are offered by addressing them to specialized supranational groups (one need only think, for example, of the field of higher education).

2.5 Public/private

Two models can traditionally be recognized in the growth of radio and television communication, each bound up with a different way of configuring the relationship between communication and public, power and market.

The model that has affirmed itself in Europe is based on a public broadcasting monopoly, first created for radio and then extended to television.
Programming in this model tended to translate and interpret the pedagogy of a balanced mix of information, education and entertainment, the main concern being to anticipate and condition the demand. The financing mechanism is particularly simple: an annual licence fee collected by the public service, with the possibility of adding advertising income, though generally subject to ceilings and political control.

In the United States, on the other hand, an organic link between supply and market, which quickly pinpointed its basic resource in advertising, has been the dominant feature right from the beginning.

But the deck was subsequently reshuffled. The availability of new advertising resources and the new marketing strategies of the business world, quite apart from technological progress, led - as we have seen - to the birth of commercial television also in Europe, generally in the early 'eighties, and thus to the end of the public monopoly.

But with differences from one country to another: if the monopoly still resists in some cases, there are others where situations of open competition are beginning to delineate themselves.

Though as a general rule the public dimension is holding its own, often displaying considerable management capacities vis-à-vis the new course, strong private subjects are now crowding the media field: not only broadcasters, but also publishers and also entrepreneurs from ambits other than communication. Not by any means disposed to restrict themselves to national confines, they tend to identify the broadcasting activity with buying and selling communication, be it cinema or home video, generalist television or its pay-if-you-wish counterpart, and have long since displaced competition to the international level, thereby accentuating the trend we have already encountered at the technology and programme supply level.

Market enlargement, product diversification and the possibility offered by technology of exploiting these products more remuneratively than was the case in traditional television broadcasting or the simple showing of films in the standard circuits, all these have combined to turn communication into big business and, what is more, into an international business.

Public/private competition is tending to become more and more intense and will undoubtedly dominate the European panorama in the next few years. But the central problem is not who is going to win this battle, but rather what kind of overall system there will remain when all the dust has settled.

Some people are inclined to shed tears for the re-assuring days of the monopoly, others - as we have seen - pin their hopes in a future that will inexorably follow in the footsteps of the American model, with a liberalized market and the public part reduced to a residual dimension and condemned to a marginal existence.

This, too, is a possibility. But, bearing in mind its stratifications and its differences, Europe does not seem to be on the way to a simple acceptance of the American model and seems more likely to champion a tailor-made third possibility.
Indeed, the European public services are the expression of a wide range of cultural, political and historical motivations and it is difficult to imagine that these could lose all their import and disappear without a trace.
To give but one example, what has happened in Italy this last decade shows the capacity of the public services of adapting to the new context. Above all, however, it allows one to presage the appropriateness for the future of a mixed model, functional with respect to the peculiar features of the growth of the media in Europe and capable of maintaining within a single system both public and private, market and service.

Once again, the decisive feature here will be the capacity of regulating - in a manner that will not be punitive, but rather propulsive for the system as a whole - both the national situations and the scenario of transnational communication, at the same time constructing links between the national regimes and a highly desirable European system of "rules of the game".

In this connection one cannot but recall the efforts already made by the European institutions to regulate a European radio and television market: from the approval by the EEC Commission of the directive on "Television without Frontiers" to the recommendations made by the Council of Europe in connection with satellite transmissions and the problems of publicity and safeguarding the rights of authors.

This effort will become all the more effective if it succeeds in stimulating the formation and consolidation processes of a European broadcasting market that will be free, certainly, but not abandoned to an indiscriminate laissez faire.

3.0. Europe and the media system: risks and chances

This brings us to the essential point of the identity and the preservation of the European media system.

To this end it will be helpful to start from the macroscopic level of the unbalance between Europe and the States.
Some figures seem to confirm that the alarm expressed is not unjustified. The lament of the cinema has long since become a ritual: on average, national films in the various European countries earn a bare 20% of the total annual takings, while the products of Hollywood manage to exceed 50%. In general, more than 40% of the fiction televised in Europe comes from America and, of the more than 90,000 hours of fiction transmitted each each year by the various national television services, European production cannot guarantee more than 5000. The overall deficit in the EEC (cinema, television and video) comes close to 1800 million dollars.

Among the causes of this strongly negative balance sheet one has to include the division of the various national markets, the language barriers, and the problems of integrating cinema and television.
As far as many people are concerned, the scenario of the years to come is therefore that of a Europe reduced to a subsystem for the distribution of American and Japanese production, be it of fiction or of information.

Nevertheless, the picture is not quite as negative as all that and is already beginning to show the signs of a change, if not a complete inversion of trend:

- Though the cinema in Europe finds it difficult to overcome the limits of what is essentially a national artisanry, an industrial production organization has recently been gaining ground in television; and at this level, at least, steeply rising costs in the USA are bringing national productions back into play in Europe and the doors are even beginning to open for their distribution on the other side of the Atlantic.

- All over Europe people are becoming more conscious of - and are indeed beginning to experiment - a coproduction policy for an organically European market, the only policy capable of ensuring real competitiveness.

- The available resources are becoming steadily greater: though in absolute terms they are still below the American level, European investments in publicity are now growing faster than their counterparts in the USA.

But at the industrial level there is yet another phenomenon that provides a new slant for the old commonplace of a frontal contraposition: the growth of the great transnational multimedial groups.
Read reductively and solely in terms of unidirectional colonization, the aggressiveness of these colossuses of the communication sector manifests not only a rebalancing potential, but also a quite unforeseeable and wholly new perspective of integration/diversification: for example, if one looks at the recent acquisition policy - which got under way due to the twin propulsion of favourable financial conditions and the trend towards integration - one notes an accentuated aggressiveness of European companies in the American market. It is not by chance that among the world's ten largest communication companies, side by side with four American groups, there is a like number of European ones.

Signs of a trend inversion can also be noted in the broadcasting field in the true sense of the term. Production is increasing, European products are beginning to appear in the American market in more than an episodic manner, and there is a growing awareness that the role of a protagonist in the new international market can be played only if it is preceded by a combined strategy of production integration and incentives.

The game is therefore likely to prove complex, with many side turnings of which it is not easy to foresee the ultimate effects, but which will undoubtedly contribute to opening the markets and - given their scale and intermeshing - reshuffling the dimensions of competition.

4.0. New perspectives

The new relationships between West and East in Europe must also be seen against this background.

The events of '89 bear significant witness to the great and decisive role that was played in the transformation of the East by the circulation of news and, consequently, also makes us conscious of the great problems - cultural and political, economic and industrial - that are raised by the great demand for information and entertainment now coming from that area.
The interest and general readiness to act shown by the institutions that determine audiovisual policy in Western Europe undoubtedly constitute an important premise, but are not by themselves sufficient to ensure equilibrium and tit-for-tat in future exchanges.

Though the Eastern countries can boast some rather antiquated production structures, they run the risk of paying the price for a total dependence at the distribution level and thus becoming a subsystem of pure consumption.

It would therefore seem that we shall have to choose between the following alternatives:

- paying purely instrumental attention to immediate commercial interests, which would reduce the East to a simple user basin for the West (and this is a terrain where America would once again come out as winner), or

- a European commitment in favour of growth and development involving not only the distribution network, but also production in the general perspective of a great new media system enlarged to comprise the entire continent.

4.2. Europe and the South

With even greater gravity, these considerations can be extended to our altogether unequal relations with the developing countries.

The horizon of the new audiovisual media system we have just delineated can further deepen this historical rift and accentuate the state of cultural colonization with all its bottlenecks and dependencies.
But it could also make a start with introducing signs of a trend inversion, and this not only on account of a moral commitment, but rather because spreading knowledge and professional capacity forms part and parcel of the structural logic of the new technologies, and this is just as true as regards the articulation into subsystems that have distributive and productive potentials of their own.

Given our historical capacity of mediating between different cultures, Europe can exalt this technological opportunity and further enhance its role in the world market by proposing itself as the reference point for the evolution of the poorer and marginal markets.

The Mediterranean, in particular, can either become a simple area of transit for Western productions on the way to invading backward markets, i.e. an area of pure consumption, or be conceived as a laboratory for processes of interchange and production rebalancing.

Let us not forget that the famous unidirectional information flow between West and East is supplemented by another and no less unidirectional flow: that from North to South. Now, these two flows intersect in an almost emblematic manner precisely in the Mediterranean area, which can therefore be the place where they are summed - a dramatically colonizing alternative - or can become the point from which to start in the endeavour of inverting the trend and rebalancing the entire media system.

5.0. Strategic scenarios

We started with some questions that gravitated around the possible cultural and economic asymmetries between European growth and transformation of the medias.
At the end of our reconnaissance across the various strata of the ongoing changes, we can pinpoint the characteristics of a strategic scenario that will work towards reducing the existing unbalances and inhomogeneities:

- **Quality:**

The epoch of the exclusive predominance of the quantitative aspect has come to an end; we are certainly no longer in the artisan stage and the dimensions of production have become distinctly industrial; but the future drives in the direction of diversification and therefore towards the exaltation of the visual and sound qualities of the new products.

- **Innovation:**

When duly modulated in relation to the particular European context, though without determinisms, innovation can constitute a fundamental motor for the growth of the system: but if it is to play this part, it will have to be appropriately "governed".

- **Synergies:**

New technologies and intense competition call for resources, integrated competences and new actors; growth and development will continue only if exchanges and interconnections can be activated: between public and private, between broadcasters and the industrial system, between hardware and software.

- **Market:**

The days of "free meals" and the welfare state are over; by means of distributive articulation and the new quality of the programme supply, communication will increase its market value and can reduce the scissors between investments and returns; the market has to be faced at each and every level: if the average work has the large audience as its target, the product of excellence, too, will have to be measured against its target and obtain remuneration.

- **Transnationality:**

The birth of a real European audiovisual market is clearly bound up with a production conceived, produced and distributed on a continental scale; at the production level this means co-productions and joint ventures, but on the content level it does not mean founding works of fiction on generic European values, but rather constructing stories by rediscovering values of international stature within the individual national cultures.

- **Rules:**
The system has to be governed and regulated, above all, by defining a framework of rules for the mixed system; within the furrow of a tradition duly adapted to the ongoing changes, Europe can find in the relationship between public and private an original and fitting hinge for further progress.

- **Exchange:**
The new European scenario must needs pass through a global strategy that will have to be proficuously diversified between advanced, backward and developing international markets.

- **Diversification:**
Technological innovation, far from making massification obligatory, can create the conditions in which even regional and quantitatively minor realities can be given space, thereby promoting dialogue between cultures and constituting a dialectical European identity.

These, then, are some of the decisive coordinates for a positive interaction between evolution of the medias and the new Europe. Even today, they are at work to gain ground in the face of resistance, difficulties and inertia.
The 'nineties will eventually tell us whether they have effectively succeeded in shaping the new topography of communication in Europe.

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Rome, November 1990