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Does the Internet fundamentally change anything?: European research and the COST A20 action on the impact of the Internet on mass media (Television, Newspapers and Radio)

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Introduction and background

James Curran has observed that there is something of a parallel between the significance accorded to the power of the press in the nineteenth century (denoted by the conventional reference to the press with an upper case 'P') and the significance attributed to the Internet, similarly represented with a capital 'I' (Curran, 2003: 237). As such, he suggests we are still in an awestruck stage as far as the internet is concerned and scholarship on the subject has in many instances not progressed beyond either uncritical techno-enthusiasm on the one hand and or sceptical judgements on what might the 'next big technology' on the other. Part of the difficulty for media scholars is that research on the subject has tended to proceed in two diverging directions, one reflecting traditional media studies research and scholarship and the other focused on a new media paradigm.[1]

The subject of this paper represents one attempt at a more balanced approach and consists of the research undertaken under the COST A20 action, 'The Impact of the Internet on Mass Media'. The paper presents a brief overview of some of the principal themes under discussion in relation to radio, television and newspapers as well as offering some reflections on the emerging issues for communications research at a cross media level. The central theme is whether there the Internet (with a capital 'I') has had the transformative effect its proponents might once have claimed or whether there has been a somewhat different process of incorporation of the net (with a small 'n').

1 David Gauntlett's Web.Studies (London: Hodder Arnold, 2004) is the best illustration of this in which Gauntlett argues that 'the arrival of new media offered a much-needed kick to the world of media and communications studies'.

The COST Action A20 was formed in 2001 to establish a European-wide network of researchers investigating the impact of the Internet on mass media industries.[2] The background to the network was a concern to study all dimensions of the convergence of telecommunications, computing and the media. The range of questions identified included at the outset technical issues, business models, social change, professional and working practice, and legal regulation. A particular emphasis was placed on the micro-economic impact of the Internet on the media and the so-called business models that might emerge for successfully converged media.

Bringing together micro studies of European media in a concerted research action it was felt would help differentiate the COST initiative from related European programmes of research. The Framework Programmes under Priority Theme 7 – Citizens and Governance in a Knowledge-Based Society' or alternatively the ESF Programme 'Changing Media – Changing Europe' have focussed respectively on large-scale issues, including governance, the socio-political context, as well as the impact of the media system as a whole on democracy and the political system. Other European approaches have tended to be macro in orientation and focussed on topics such as: media policy on an national and EU level, concentration and media competition, the overall impact of ICTs, changing patterns of media consumption, reception analysis, cultural identity, media imperialism, as well as issues of media and gender. The ESF project also gave a great deal of attention to the qualitative, semiotic and the cultural. At its inception, the COST A20 project was intended to be complementary but with greater focus on micro-economic (and later social) impact as well as more specifically on the consequences of convergence of the Internet and traditional media production and delivery.

The COST research network has also sought to build on the potential for a more cohesive approach to European research and by combining accounts of European experiences in very different contexts attempted to develop a number of pan-European themes in its analysis. While the US has traditionally been seen as technologically and economically more advanced in the deployment of Internet technologies, Europe

[2] COST A20 website: http://cost-a20.iscte.pt/ (A new web site is in preparation and will be available from July 05).

is not significantly disadvantaged and overall seven of the ten most connected countries in the world are European. The European experience itself is, however, very uneven ranging from the highest levels of connectivity in the Nordic countries to very low levels of Internet penetration in parts of Eastern Europe. There are also some significant differences in the European media landscape compared to that of the US, including the highly competitive environment in which the press operates to the greater levels of regulation in broadcast markets, frequently with the state as the major presence. Important also from the European context is the fact that media systems and patterns of media consumption are mostly organised along national lines. While Europe represents a relatively rich media market, it is also much more internally divided by language, politics, habit and tradition than is that of the USA. The impact of the Internet as a global technology on the European media landscape therefore has to be seen in the context of the very specific experiences of participant countries and part of what the COST network has tried to achieve is a forum in which such experiences may be studied and analysed.

In summary, the main objective of the COST A20 network is to develop knowledge in order to understand the various changes that mass media industries are undergoing now, and will undergo in the future as a result of the development of the Internet.[3] The key tasks of the network involve:

- Theoretical research and understanding of the nature of the impact of the Internet on the media, examining *inter alia* how existing media and media content is and can be re-purposed for the Internet, as well as an understanding of the new kinds of content that are facilitated by technological developments.
- An analysis of the concrete changes to the business models of different media enterprises because of the shifting competitive environment and their attempts to respond to it, including new entrants to the market as a result of technical changes, mergers or alliances as well as the possibility of entering multiple markets opened by new technologies.
- Investigation of regulatory issues arising from changing market structures and new technological developments.

[3] Details of the project's organisation and structure are available in the Memorandum of Understanding: http://cost-a20.iscte.pt/documents.htm

- Consideration of the changes in the kinds of media content arising from a changed environments and a comparison between the online and offline world of the content available to consumers and citizens.

The model adopted by the network has been a process of investigation by separate work groups initially organised according as follows:

1. The newspaper press and magazine press
2. Television and film
3. Radio
4. Cross media

15 European countries are represented by approximately 50 researchers and the network has been funded from 2002 to 2006. To date two major plenary meetings have been organised and the closing conference is scheduled for April 2006.

Impact of the Internet: key themes of the scientific programme

The underpinning assumption of the COST research action is that despite its relative novelty, the Internet has the potential or has in fact impacted significantly on existing processes of production and distribution of media content. At the outset, the following features of the Internet's potential impact were identified by Colin Sparks (see Sparks, 2003; COST A20, Memorandum of Agreement), the Chairperson of the Network, as particularly significant for the established media:

1. The Internet offers a common delivery technology over the different technologies involved in mass media distribution. Internet content is digital in form and distributed by a variety of means, currently predominantly in wired form but increasingly wireless will become more prevalent. Reception of internet content is primarily through the personal computer but in the future will be available across a wide variety of platforms, including television sets, mobile devices and PDAs as well as games consoles.

2. The Internet lowers distribution costs, and in some cases production costs for media products. Digitalisation has resulted in the main in much lower cost

production and distribution systems thereby offering fewer entry barriers for some media. Newspapers and magazines have large distribution overheads which significantly absent in online delivery. Other factors affect electronic media but in general, distribution is a much less significant element.

3. Patterns of media consumption are altered and renegotiated in internet-bases forms of delivery. In contrast to the relatively fixed patterns of existing media, online consumption is not bound by the same time patterns and daily routines. are consumed according to patterns of social behaviour that are embedded in daily routines. Consumption of the Internet is less structured and not as well established.

4. Internet delivery overturns the spatio – temporal advantages and patterns of existing media. Physical and political geography as well as the temporal patterns of media distribution are no longer relevant faced with the availability of media context on the Internet.

5. The Internet competes with traditional mass media for revenue streams. The traditional sources of funding (subsidies, licence fees, subscription, and advertising) will come under increasing pressure with Internet media as a competitor.

6. The Internet has allowed the disaggregation of editorial and advertising content. Audiences and readers can bypass advertising if they wish and no longer need to be exposed to the advertising message in order to gain access to editorial material or vice versa. Advertisers can develop direct relations with readers and customers in targeted ways avoiding the need to address mass audiences. Furthermore, the potential exists for a much more blurred boundary between editorial and advertising content. The conventions that distinguish editorial content from advertising material do not yet exist within the online world.

Many of the above features may be said to bring into question the business models of established media or at least to act as important determinants of any new business models that emerge for converged media. However, the resulting issues are matters of empirical research and individual work groups have examined quite distinct media relying on different levels and configurations of Internet technology.

Engaging users – interactivity, added value and the Internet

A central theme of research across the different working groups thus far has been a concentration on the central topic of interactivity as that added value feature which the Internet supposedly offers over established media. The print media strand, for example, building on a typology of online news services has examined the structure and meaning of interactivity as it has adopted by web-based news media. The range of provision varies significantly from newspapers with minimal content online to more to those which offer substantial additional content. In general, relatively low levels of interactivity are evident hampered by the fact that the practices of online newspapers are predominantly borrowed from those of offline and that the incorporation of interactivity has thus far not reached anything like the potential offered by online delivery. Indeed, where news design has become more subtle and sophisticated in print form, most online news delivery has used unimaginative, pre-ordered lists. The more sophisticated, which offer enhanced, web specific content are the preserve of the broadsheet quality press, attracts more visitors and are in general somewhat more sheltered from immediate commercial pressures, treating the development of online news as a longer term investment. Interestingly, what this suggests is that the online public sphere appears to have a more socially elite character than the offline version (Sparks, 2002).

One of the aspirations of the Internet is that it will somehow democratically reform public communications through more diverse, more open and more accountable journalism and debate. O'Sullivan (2005) in a study of Irish online news has examined whether this potential has begun to be realized and whether this is a vision shared by journalists. Based on a survey of Irish online news sites and interviews with journalists across the sector, what he has found is far from a revolution in media, but an expression of the cautious continuity, if not inertia, of media content and practice.

Many journalists, for instance, raised major questions over standards in online journalism, questioning journalistic and editorial skills apparent in many examples. Audience feedback, which is how journalists referred to interactivity, was regarded as a positive feature though many viewed with scepticism the notion that they as journalists could be held more accountable or were obliged to enter into greater dialogue with their readers as a result. Many journalists argued that their professional role was enhanced in a new media context and that it involved a shift from providing information to providing interpretation in the context of information overload.

With regard to the shape of online news, O'Sullivan in the same study argues that enhancement of content, interactivity, immediacy, increased depth and new ways of telling stories are some of the possibilities that are present, or at least latent, in online news. With the apparent increase in the amount of news available via the Internet, the question arises whether there is a genuine increase in the breadth and depth of journalistic activity or more simply remediation of news across new platforms and outlets. Based on his survey of Irish online news, O'Sullivan found a cautious and conservative approach to online news design. Interactive elements such as links, polls, bulletin boards are used in the most prominent sites but sparsely in others. While there was some evidence towards greater immediacy and use of updates and breaking news sections, this likewise was a feature of national news sites such as Ireland.com or unison.ie/. Similarly, expansion of content, provision of additional, in-depth reports and the use of searchable archives is almost exclusively the preserve of the national traditional media reflecting the costs involved as well as the dominance of elite media just as in the offline world.

Research in the television group has centred around digital television as the vehicle which promises the kinds of interactive services normally associated with the Internet. The evidence illustrates however that the roll out of digital television has been slow, particularly in its terrestrial form, and that the use of the medium for internet-like interactive services is much less than was forecast. Where initially the promise of digital television was very strong, and governments confidently predicted that successful roll-out of Digital Terrestrial Television (DTT) would allow analogue networks to be switched off, it is now recognised that such targets are unlikely to be

met. There is also growing evidence serious ‘churn rates’ in digital subscriptions with services such as BskyB reaching saturation point.

The promise of interactive television (iTV) is that it will democratise and "demassify" the medium, bridging and creating a smooth continuum between the separate worlds of interpersonal and mass-mediated communication. Corcoran (2003) has questioned whether the ideology of centralised cultural control at the core of the traditional television system allow for the grafting on of interactivity in any meaningful sense, or will this yield only "reactive TV"? Given the pace and development of digital television, there are now many questions and uncertainties about the future interactive television, including who will fund it, who will view it and what it will look like. The question raised by Corcoran is whether "Big Brother" is in any way predictive of how ITV might develop in the near future?

An initial focus of the Radio work group was on the impact of the Internet on delivery of music services, with particular reference to music downloading and the potential of p-to-p networks. A reorganisation of the group resulted in a revised agenda entitled ‘Digital Radio Cultures in Europe’ (DRACE). By ‘digital’ is meant Internet sound media, terrestrial and satellite transmission of digital signals, as well as transfer of data via mobile phones. The goal of the radio group is to map the emerging landscape for digital radio, paying particular attention to variations across Europe and comparing results of region-specific studies.

In common with the other work groups, an underpinning framework for the Radio group is a consideration of the claim that an enhanced experience of interactivity (or participation or empowerment) is provided when a medium such as radio successfully incorporates internet based strategies. As in other projects, there is both a normative and an empirical aspect to the question. Normatively, interactivity is valued as an end in itself, seen in terms of its benefits for civic society and democracy as well as supporting processes of access and participation in radio. This is also an empirical project and studies are underway that specifically look at how ‘community’ radio has developed in a digital audio environment both within a traditional sense of community and within a trans-national virtual community where ethnicity or a common interest (e.g. minority music or content) is what binds the audiences together across trans-national frontiers.

On-line radio cultures is the strand of the work group that looks at the manifest adoption of the Internet by radio through the online presence of radio stations. The project examines new forms of content, production goals and cultural spaces that the Internet allows for. Key questions include: what happens to the cultural sphere of radio as online services become more important? What happens to the management of music, the relationship with the parent medium, and the journalistic ethos? The project is currently examining the factors that might influence the content orientation of radio stations' web pages (e.g. source of financing, type of administration, ownership, etc.) as well as studying what impact use of the Internet is having on the nature of the medium itself.

Part of the task for the radio group is to map the changing technological landscape in which radio operates. Particularly in the case of radio, there is now an accelerated process of change in the technologies for delivering audio services and the functionality offered by FM/AM transmission, DAB and satellite radio, web radio of many kinds, audio streaming to mobile phones, provides numerous challenges as well opportunities for broadcasters. Of particular importance in this study is a consideration of which technological solutions regulators favour and which will meet the needs of broadcast audiences across Europe. Ten years after its inception, digital radio is only slowly emerging in the new media landscape. While digital television is advancing in many European countries, digital radio's presence is patchy, with some countries promoting the system and others adopting a wait-and-see approach.

The DAB (for Digital Audio Broadcasting) system began in the mid-1980s as a European research project with the aim of providing a digital successor to analogue FM radio. It was intended to offer high quality sound and to make more efficient use of the radio spectrum and thus offer far more stations and also text and multimedia content. In common with most other media, the progression from analogue to digital originally seemed to broadcasters and other commentators to be an obvious stage in radio's evolution. However, opinion is now varied and some argue that DAB is in fact not well suited to certain broadcasting requirements (e.g. small scale or community radio). In line with this uncertainty, patterns of development are becoming more variable: while some countries continue to promote DAB, others are delaying

implementation or even withdrawing earlier deployments. This DRACE project aims to research the different modes of development of DAB across Europe and to identify what factors might explain such differences. The different models for DAB diffusion range from the leading country in Europe (and indeed the World) to some of the least developed services. Analysing these developments in terms of general patterns of broadcasting in those countries and the role of government policy and public and private interest will yield valuable insights into this particular technological system, but also inform debates about digital media policy more generally.

Conclusions

Objective measures of the impact of the Internet on mass media in Europe, the central topic which COST A20 is addressing, would yield a mixed and uneven picture with rapid advances taking place in some sectors but in many cases slow development, sparse approaches to convergence, uncertain business models and far less optimistic forecasts compared to 10 years ago. Fortunati (2005) has argued, however, that the most crucial measure of the impact of the internet on established media does not have to depend on the more-or-less forced invasion of the internet by the press, radio and television, but should be thought of in more subtle, dialogic ways. More specifically, she argues, its impact should be seen in the mediatization of the net, both fixed (computer/internet) and mobile (internet/mobile phone), and in the 'internetization' of traditional mass media. Looked at as simultaneous twin processes enables one to view the succession of thrusts and counter-thrusts, modifications and reciprocal incursions, for which the traditional means of communication and the internet have been responsible. Such a perspective perhaps reveals a more complete if not as revolutionary a form of convergence, reflecting a slower process of incorporation.

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