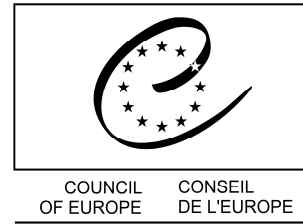




Ministry of Education, Science and Culture



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A new notion of media?
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France

Global media in the digital age

I. - The challenges of the new media landscape

Throughout Europe, the new media landscape is indisputably digital. Almost half the homes in Europe are equipped with an Internet connection and regular online consumption of radio, television and press has now become lastingly established in all countries.

Above all, even though the current economic recession is limiting the purchasing power of households, the take-up of digital technologies should continue apace, because information in all its forms is an essential need of our societies and our economy runs more and more on the movement of ideas and knowledge.

What does this digital era mean for the media sector?

It is now a truism that the age of digital convergence is profoundly reshaping the conditions in which the media operate. The current transformations are affecting their uses and, consequently, economic and organisational models and the ways they produce and disseminate content. Rendered vulnerable by economic recession and the resultant loss of advertising income, the media are now undergoing a radical structural transformation.

That said, the job of the media has not changed: it is still to inform, educate and entertain. Their role in forming public opinion and collective awareness makes them a long-term mainstay of the proper functioning of a democratic society. In this new environment the media should be accessible to everyone, and thus we can assert the need for all stakeholders, whether public or private, to work to enable the media to develop afresh in the digital age.

Looked at from this point of view, the "global media" concept, which embraces not only a new form of organisation of the media but also a new relationship with the public, becomes fully relevant. Some call it "360-degree media", but it clearly refers to the same reality and goal of mastering all types of physical and virtual, linear and non-linear means that enable a given medium to reach its audience and link the various means into a coherent whole around a strong brand identity.

The public authorities have an important role to perform in aiding and consolidating the emergence of global media. The European Union and the Council of Europe back this process, as the Audiovisual Media Services Directive, the ongoing revision of the European Convention on Transfrontier Television and, of course, the holding of this conference under the aegis of the Council of Europe all testify.

II. - Digital convergence points to global media

It is through changing patterns of consumer use that digital convergence impacts the media sector. The public now has access to new platforms for the distribution of media content, new storage and portability possibilities, and to an increasingly diversified and personalised offer.

The user's control over the types of content on offer is strengthened as a result. Consumers, who previously passively absorbed a limited supply of linear media that imposed programmes at fixed times on a single platform, will today seek out, from a mind-boggling range of linear and on-demand media services, a content to their taste on a platform of their choice at a time of their choosing.

What is more, the burgeoning of user-generated contents and the possibility of participating and reacting afforded by the Internet are radically changing the user's relationship with the content and the work: an active relationship with the medium is emerging.

What we are in fact witnessing is an amplification of the media user's freedom, and this freedom casts the question of which content to consume in a new light. The way users select content is more akin to looking through a catalogue and to making a selection of programmes. Furthermore, the development of downloading and streaming leads some to hope they will be able to access content and not pay unless they choose to.

The user's greater freedom imposes correspondingly greater constraints on the other players in the media relationship, for while the demand for media is not infinitely elastic, the explosion of both the supply and its diversity increases competition to win an audience. The media audience is ever more fragmented, and audience loyalty is harder and harder to build and retain. In addition, the sources of financing available for the media are limited. Whether those sources are advertising, subscription fees or public funds, fragmentation of demand could bring about fragmentation of supply and undermine financing for the creation of innovative content with high added value.

Yet there is more than just the substitution effect between different modes of access to content; there are also significant complementary effects, and genuine multiplier effects. The interaction of the various platforms is complex and requires minute analysis. One certainty is that media brand and media carrier are starting to separate. In the linear environment, the brand had no choice as regards the mode of distribution, to which it was indissolubly tied. That is no longer true.

These are the two phenomena that make the advent of global media possible. What a media brand now needs to do is assert its identity independently of the medium of its distribution, relying on a strategy organised around content and its editorialisation. The brand must operate on every platform that will enable it to reach its audience, in a co-ordinated fashion and making the most of interactions between different platforms.

In response to changing consumption patterns, the media are constructing their digital brands around new interactive services such as catch-up TV or offers of specific content on demand. As an instrument for representation, presentation and selection of content and for marketing and building customer loyalty, the portal is the consummate expression of globality. In this respect it is significant, for example, that the streaming news channel France 24 opened its Internet portal before it began actual broadcasting.

The print media have not escaped this trend. They need furthermore to adapt to the existence of search engines and content aggregators, which change the way information is sought and found and the way it is presented and prioritised. To ensure that the electronic and printed versions of a newspaper or magazine are mutually supportive, what is needed is a robust brand which may be founded on thematic content, the specific character of the target readership, or, in the case of the general-interest press, a well-established editorial register and editorial line. It is also necessary to adapt to each medium, including in the drafting of articles, since a news website is not consulted in the same way as a newspaper is read.

What makes a medium global is without doubt its presence on all types of carrier and the co-ordination of the carriers used. With ever more varied reception equipment and access portability, the media have taken on board the need for multi-platform distribution of their services, incorporating this strategy of "virality" (web content being spread by users) into a "Web 2.0" approach aimed at boosting the attractiveness of their brand.

This strategy therefore requires the appropriate organisational consequences to be drawn. If the implications of the transition to a global medium are really to be managed, media services must organise themselves around content and no longer simply around the medium. In this context, media may in particular be led to join forces in order to enhance their negotiating strength and their ability to fund creative work. This does not necessarily entail capital restructuring, but rather the mutualisation of certain resources. The creation of the single enterprise France Télévisions is an illustration of this trend and of the building of a global medium around a number of complementary channels.

III. - The new relationship between the media and their users: striking a balance

The media are thus building digital development strategies around the repartitioning of distribution formats in a perpetually changing environment where the population of websurfers and the global supply of available content never stops growing.

In this age of digital convergence, when Internet use is the hub of progress towards a global medium, the task is to foster a civilised Internet where the interests of the different stakeholders translate into respect for everyone's rights and responsibilities. New rules must be defined and accepted by all. That is why the main effort required of us is one of education.

During the Internet's early development, what mattered most was to allow this new medium to realise its full potential and not hamper a remarkable communication tool. The resultant formidable growth of the Internet has revolutionised personal and mass communication.

New players and new expectations have gradually emerged; the sometimes contradictory interests of users, authors, publishers, access providers and infrastructure managers have become clear. Protective technologies have been introduced to control access to works, often to the detriment of interoperability and easy access for users, as have special rules on access providers' liability, because general Internet surveillance was inconceivable.

However, it must be acknowledged that protection of access providers' and users' rights has developed more markedly than protection of authors' and publishers' rights. This explains the appearance of illegal mass downloading, which has done considerable damage to the music industry and is about to do likewise to the audiovisual industries.

Today the new stage reached in the approach to the Internet calls for dialogue between the various stakeholders in order to transcend the assertion of conflicting interests and identify mutually beneficial avenues of co-operation. It involves guiding the websurfer's access to the desired content in a way that combines combating online pirating of works with expanding the lawful supply of online content. The one is not a precondition for the other, but the success of each depends on the success of the other.

In the same way these changing modes of access to content also entail supporting the development of the online press by giving it a proper status that can facilitate the growth of pluralist, good quality information in the digital universe. Now that the pace is set by audience demand and interest in the press is usually combined with active participation on the Internet, the authorities have a duty to establish an online press publishers' code that defines rights and obligations and excludes none of the media carriers used.

This means that if online press publishers are fully to discharge their responsibility, they must adapt to the specific demands of the digital universe and in particular the manifold types of contributor and sources of content. In widening access to information and giving readers the opportunity to interact with the contents, the online press thus conceived will be able to meet the challenge of audience fragmentation in a context of ever more enriched global media provision.

Beyond that, it is the authorities' responsibility to ensure coherence between the "physical" universe and the "digital" universe, through fair and technologically neutral treatment of the different media distribution platforms. At a time when new online strategies are being devised and business models constructed in a fast-changing context, benign state intervention (legal rules, fiscal environment, public subsidies) is crucial for the full development of global media and for the long-term financing of creation and supplies of content.

In the final analysis the challenge today is twofold: to redefine the place of the media in the new digital landscape and to ensure that the legal framework of its operation remains appropriate and sufficiently flexible. This conference provides the opportunity for collective consideration of these challenges and identification of points of convergence on which promising proposals can be based.