COUNCIL OF EUROPE
CONSEIL DE L' EUROPE

COMMITTEE OF MINISTERS

Strasbourg 29 December 1982

restricted
addendum to
CM (82) 214
/CDMM (82) 7/

CMD001438

STEERING COMMITTEE ON THE MASS MEDIA (CDMM)

THE INTERDEPENDENCE OF THE MEDIA

by

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Opinions expressed in this study are strictly those of the author personally and do not necessarily reflect the point of view of the CDMM and its members.

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I N T R O D U C T I O N

Communication systems are entirely interdependent. Such interdependent relations are naturally becoming increasingly complex as these systems develop and change with the arrival of new technology and functions.

It would be foolhardy to attempt an exhaustive study of the changes currently being caused by the emergence of new electronic media - satellite, cable, video, telematics - especially as such changes are continuous and must be continuously examined. This report will simply outline some important trends and try to show the way to a further more detailed and thorough consideration of the question(1). As the length of this type of report is strictly limited, an outline is all that can be given here.

The study concentrates particularly on the electronic media. They will undergo the most important changes and in turn cause considerable upheavals in our communication systems. Their effect on other media, in particular the press and the cinema, will be just as important. In so far as vital interests are at stake, their relations with the audio-visual media will be examined.

The study will begin with a brief outline of the state of progress of technical systems and their functions.

It will then deal with the different types of INTERACTIONS: between the new and old electronic media; between the electronic and other media; between the public service media and commercial media ... these interactions are approached on the basis of three major tendencies: SUBSTITUTIVE, ASSOCIATIVE and INTEGRATIONIST.

The various forms of inter-relations are put in the GENERAL CONTEXT of communication systems, a context characterised by both contradictory and complementary developments.

On the basis of this overall perspective, an attempt will be made to draw some concrete CONCLUSIONS.

June 1982.

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(1) The problem of copyright and the rights of contributors is left aside, because although it is a universal problem, it is so complex that it must be dealt with by specialists.

I. SYSTEMS

There are broadly three major electronic audio-visual media systems, distinguished by their technical characteristics and the ways in which they can be used. Each has a substantial development potential.

THE BROADCASTING SYSTEM is based on "hertzian" transmission over the air. The system will be able to provide new services in three ways: the re-organisation of certain earth frequency bands, the setting up of transmission channels, particularly by using the numeric system.

THE CABLE SYSTEM includes both telephone networks (narrow-band cable) and cable television networks (broad-band cable).

A newcomer to the audio-visual media, the telephone will play an increasing role thanks to the development of telematics and its mass applications.

Once a mere palliative for the hertzian network, coaxial cable television is becoming an independent medium producing new services. The use of fibre optics will infinitely increase its transmission capacity and the establishment of networks in space will lead to technical interactivity making two-way and multidirectional communication possible.

THE VIDEO SYSTEM (1) is composed of a variety of so-called "light" systems capable of producing, reproducing and storing video documents: cassettes, discs, recording and reading equipment, assembly units.

Most of this equipment is intended for the general public, some of it for semi-professional use. Separate from long-distance transmission networks and hertzian and cable networks, these systems are also known as "AUTONOMOUS" or "PRIVATE" media. To be accessible to users however, they depend on the existence of commercial or public service type distribution networks.

A brief outline of the state of the media in these three systems already gives an idea of their complex relations, and the variety of interests which unite and divide them. It also shows that the dividing lines between the systems are loose and become blurred as certain networks tend to interconnect and ultimately form closely integrated structures.

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(1) Video is in fact the generic term for any electronic process that produces and broadcasts an image. It is used here in accordance with the currently accepted meaning of the term which has narrowed its scope to miniaturised equipment intended for general and semi-professional use.

NB Professionals working in this field also have of course their own "light video", which however complies with specific technical standards.

I. THE BROADCASTING SYSTEM

In most European countries the so-called "hertzian" system has traditionally been the exclusive property of public radio and television, established in the form of a monopoly or duopoly (1).

However, other users are now demanding access to this system on the basis of its technical potential. Indeed, in spite of the narrowness of the spectrum of frequencies, there are possibilities for extending and diversifying it.

1. Earth networks: local radio

The first possibility arises as a result of a redistribution of certain frequency bands on EARTH NETWORKS: in particular, radio space between 87.5 and 100 MHz, and even between 100 and 104 MHz.

In most countries, this space will in future be to a great extent sub-divided among a large number of regional and local stations. These stations will exist both within the framework of and INDEPENDENT of established bodies.

What is referred to as "FREE RADIO" has taken root in Europe since the first "pirates of the waves" illegally occupied air-space in Italy about 10 years ago.

Born out of the hope in a new found freedom of expression, local stations in Italy have lapsed into conformism and banality. Although there are more than 5,000 radio stations and more than 1,000 television stations in Italy in addition to RAI channels (2), 90% of those are purely commercial or serve the interests of political parties. Having been organised into networks and dominated by large conglomerates, it is hardly possible anymore to detect their local character: indeed their openly declared aim now is to create NATIONAL broadcasting structures in direct competition with the RAI (3).

There has been a desire to avoid this development in FRANCE and BELGIUM, where a statutory scheme has just been adopted for the purposes of recognising local "non-monopoly" radio stations and has laid down the following restrictions: limited transmission range, no advertising or reliance on commercial interest groups, and a prohibition against forming the stations into networks. Apart from entertainment, the new radio stations must provide a substantial amount of information, culture and education.

It will be observed however that in both countries the no advertising rule is subject to possible amendment. In SWITZERLAND moreover, local radio stations subsidised by advertising have just been authorised on an experimental basis for a three to five-year period.

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(1) Oligopolistic tendencies in the United Kingdom and the Federal Republic of Germany (NB in the United Kingdom, commercial radio and television is subject to the authority of a public body).

(2) A private body responsible for public radio and television pursuant to any state concession.

(3) For a more detailed account of the Italian situation, cf pp 21-23.

Previously, other countries such as the UNITED KINGDOM and SWEDEN had set up local radio stations, partly within the framework of existing radio and television stations. Sweden in particular was supposed to introduce original structures: not only 24 local radio stations set up within one subsidiary of SVERIGES RADIO, but 15 experimental "NEIGHBOURHOOD RADIO" stations with a transmission range of 2-3 km, operated by organisations and groups sharing the daily transmission time.

In between the two extremes of Italian style chaos and commercial freedom, and the "Swedish solution" of a highly structured and totally non-commercial system, many countries are now looking for a way to deal with the first major movement challenging the traditional structures of radio and television.

This movement is part of a GENERAL TREND towards DECENTRALISATION right across Europe and is increasingly trying to express itself in communication systems. It has been exploited by various interest groups, who illegally occupy the waves as part of their extra-legal tactics. The plan of breaking up the systems by means of violence begins by infiltrating a few "inoffensive" stations, then widens with more powerful transmissions and ends up creating networks ...

This approach is all the more effective as it is carried out with the combined complicity of political, economic and cultural circles: for different or even opposite reasons - expectation of electoral or material gain or of better communication - their interests converge in a complex and ambiguous game.

Legalisation - official recognition accompanied by regulations - appears to be the only way to control the movement. This involves being able not only to define the rules but also to enforce them ... it is clear that while new radio and television stations (1) reflect a necessary decentralisation of the audio-visual media, many interests will try to broaden them beyond the local sphere in search of bigger and more lucrative audiences: "decentralisation", "democratisation" and "freedom" are merely alibis in this respect.

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(1) To date, local hertzian television stations exist on a large scale only in Italy.

2. Space network: transnational television

At the opposite extreme to decentralisation, the hertzian system provides new frequencies for transnational networks set up in SPACE by means of satellites (1).

These frequencies, which have been distributed in Europe for almost five years (2) on the 11.7 to 12.5 GHz band, will provide each country with the equivalent of five colour television channels. Current predictions say that these frequencies will be full by 1985.

Technically, broadcasting satellites (1) have only a relaying function whereby the range and number of programmes can be extended. However, they constitute a major political development which may lead to radical changes in the audio-visual media at national and European level.

In 1977 in Geneva, the frequencies and orbital positions of the future satellites were determined so that each country was guaranteed national coverage - it being understood that there would inevitably be technical spillovers into neighbouring countries. However, technological developments, particularly in respect of aerials, have more or less buried the Geneva plan. Each satellite system has a reception zone that is several times that of the official range, now referred to as "administrative".

Thus, most of the projects in Europe today are progressing towards transnational broadcasting. A brief outline of these projects shows several types of systems:

- National "world viewing" projects

This type of project includes the BBC project recently approved by the United Kingdom Government, featuring in addition to a paid television channel, a "Window on the World" programme based on the best TV programmes from around the world.

- National "European" projects

French and German satellites

The Intergovernmental Technical Co-operation Agreement, signed on 29 April 1980 provides for the setting up of two similar satellites covering France (TDF1) and Germany (TV-SAT) respectively. These are the first in Europe and should be launched in 1985/1986.

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(1) There are generally three types of satellites:

- intercontinental contribution satellites, requiring very big transmission and reception aerials (up to 30 m in diameter).
- distribution satellites received by smaller and less expensive aerials (a few meters in diameter).
- radio broadcasting satellites which may be received directly by private individuals on light aerials (1 meter or less in diameter).

(2) By the World Administrative Radio Conference, Geneva, 1977.

Intended essentially for national services, these satellites will be able to provide wider programming.

Among the possibilities being examined by the French Government is the creation of a "European audio-visual space" (or, failing that, a French-speaking space) which would be achieved in co-operation with several countries.

In Germany, ARD AND ZDF, the radio and television organisations, have put forward various suggestions for a European "programme".

The first commercial projects: "LUX-SAT" (1) and "TEL SAT"

The LUXEMBOURG TELEVISION SERVICE (CLT) has just approved in principle of a Luxembourg satellite with a European orientation which would cater for French, German and Dutch-speaking regions.

The TEL-SAT PROJECT, promoted mainly by Swiss publishers, intends to provide programmes in the three national languages of Switzerland but would cater essentially for a foreign audience.

- Regional projects in northern and southern Europe

The NORDSAT SYSTEM, peculiar to the Scandinavian countries, is intended to meet the demand in those countries for better cultural integration and a defence of the nordic region against other satellites.

The project remains however a controversial subject and Denmark has withdrawn from it on the ground that the system is over-ambitious. The project is potentially competing with the Swedish TELE-X project, a hybrid satellite intended to serve both broadcasting and telecommunications.

As regards southern and south-eastern Europe, the AUSTRIAN radio and television service ORF has proposed a regional initiative, along with SWITZERLAND and GERMANY (a specifically cultural initiative).

- Pan-European projects: EBU and European Communities

Several radio and television organisations will attempt to provide common or even integrated European programming on some of the European Space Agency's L-SAT satellite channels, (ESA) (2). Various proposals are being examined and will be subjected to preliminary tests on the two European telecommunication satellites, OTS II Orbital Test Satellites) and ECS (European Communication Satellite). The first tests began on OTS in May 1982.

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(1) A non-official name.

(2) "Large satellite": this is a hybrid satellite expected to be launched in 1985-86.

It is hoped in European institutions to use satellites as an instrument of integration, if not of information specifically for Europe. The European Parliament has requested in particular that each national satellite system should reserve a certain space for Europe. Moreover, in March 1982, it invited the Commission to report on the media in Europe, a report which will make it possible to build the political and legal foundations needed to set up a European television schedule.

This abundance of political plans is in contrast to the cultural scepticism about satellites, regarded as a luxury imposed by industry for purely economic reasons and threatening the present communications system with sudden collapse.

In fact, the race in space has given rise to serious concern;

At NATIONAL LEVEL, the satellites will tend to challenge the monopoly of public radio and television: powerful private interest groups now intend to exploit the new possibilities of hertzian transmission.

At INTERNATIONAL LEVEL, no country will be able to implement an audio-visual policy any more without taking account of its neighbours. Countries will have to transcend the contradiction between the principles of the freedom of information and the cultural sovereignty of states together.

Whoever has the most media space will undoubtedly be the most persuasive in this debate ...

The space is already being occupied: The British commercial concern "Satellite Television Ltd"/STL is distributing film series and documentaries in Europe that include advertising on the OTS II European telecommunication satellite (1); in several countries (including Finland, for example), these programmes have already been included in cable networks.

Thus, BROADCASTING satellites are hardly needed to jolt the audio-visual media in Europe forward into the space age. The explosive development of cable satellite systems in the United States for example shows how important DISTRIBUTION satellites can be.

In fact, the technical barriers dividing broadcasting satellites and telecommunication (or distribution) satellites are breaking down as the distinction between collective and individual communication within integrated networks is ceasing to exist. Consequently, both types of satellites must now be regarded as potential elements in any social communication system.

3. Intensive use of networks: telematics

The third possible development of the hertzian system is the use of residual space in each transmission channel. This space is limited but could be used to complement traditional programmes by extra services.

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(1) Officially to set up a direct link between the United Kingdom and Malta (permission to use the OTS was granted by EUTELSAT INTERIMAIRE, provided the signals were coded, which required in both countries permission by the PTT to use encryption).

o Main systems of distribution satellites and direct broadcasting satellites

o Main projects

	NAME of SYSTEM	FUNCTIONS	LAUNCHING planned	OPERATOR
EUROPE European Space Agency	OTS II Orbital Test Satellite	Technical experiments: telecom. and distribution of radio/TV programmes Some regular links: eg France - Tunisia, United Kingdom - Malta (STL)	1978	EUTELSAT
	ECS Series European Communication Satellite	Telecom. and Eurovision network: distribution of radio/TV programmes	1983/4	EUTELSAT
	L-SAT Large Satellite	Telecom. and direct broadcasting	1986	EUTELSAT
NORDIC COUNTRIES	NORDSAT	Priority for direct broadcasting		
FRANCE and FEDERAL REPUBLIC OF GERMANY	SYMPHONIE Series	Experiments in distribution of radio/TV; occasional and regular links	1974/5	Franco-German Group
FRANCE	TDF 1	Direct broadcasting	1985/6	Télédiffusion de France
	Télécom Series	Telecom. and distribution of radio-TV programmes	1982	PTT
FEDERAL REPUBLIC OF GERMANY	TV-SAT	Direct Broadcasting	1985/6	PTT
SWEDEN	TELE-X	Telecom and direct broadcasting		
LUXEMBOURG	LUX-SAT (1)	Direct broadcasting		
SWITZERLAND	(TEL-SAT)	Direct broadcasting		
UNITED KINGDOM	UK-SAT	Direct broadcasting	1986	

( ) Project not approved

(1) Non-official name

Thus for example on television, video lines that are non-active in the transmission of electronic images could be used in order to broadcast data and graphics in the form of teletext.

Teletext is part of what is now known in France as "télématique". The latter has to date been confined to institutions and firms but is becoming accessible to the general public by means of the HOME television set.

The various teletext systems in Europe offer essentially three types of messages: news and information about services; supplements to television programmes; translations and sub-titles (especially for the hard of hearing).

1. Most of the systems resemble the English CEFAX/ORACLE system, whose services are already widely available to the public: more than 200,000 sets designed for teletext are operating in the United Kingdom. The BBC offers them 200 pages of information and ITV 350 pages (1).

ORF/Austria, one of the television services that adopted the basic English standard, was the first to begin its test programme in January 1980. 100,000 decoders are in use today and will soon have access to 200 pages.

In the Netherlands, the NOS operates the TELETEKST system which includes 200 pages and can be received by approximately 150,000 sets. A similar system is offered in Belgium by BRT/Dutch-speaking Broadcasting Organisation which may count on an audience of about 50,000 households.

The VIDEOTEXT system on the two German television channels (ARD and ZDF) is received by about 100,000 sets equipped with decoders. It offers 200 pages of which 15 are reserved for the national daily press.

In addition to 100 pages of information, Swedish television provides a service for the hard of hearing. Its teletext system can be received on approximately 50,000 sets.

Swiss television, the most recent service to adopt this system, offers 64 pages in German only.

2. The French ANTIOPE system is more complex and suffers from the unavailability of decoders on the general market. However, about 12 ANTIOPE programmes are already operating. Three of them are for the general public and are broadcast by networks transmitting television programmes. The others are intended for professional groups or regional audiences and are broadcast either on specialised transmitters (in Paris and Lyon) or on one of the national networks' transmitters.

ANTIOPE is in fact the first DIVERSIFIED teletext system both in respect of the coverage zones and the types of audiences. Francophone Belgian television/RTBF has also chosen the ANTIOPE standard for its PERCEVAL system (200 pages).

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(1) The ORACLE system has recently begun to broadcast advertising messages pursuant to the IBA code for teletext transmissions of May 1981. These messages may appear in the form of complete pages (which may not exceed 50% of the total number) or short slogans at the bottom of editorial pages.

3. As the two major systems are incompatible, several international organisations (EBU, ITTCC) have undertaken studies in order to standardise decoding terminals: the same decoder could therefore provide access to several teletext systems. It should also be able to adapt to other electronic text transmission systems.

Teletext and even telematics can use both the HERTZIAN and the CABLE networks. A hybrid system, it is a cross between broadcasting and telecommunication, the former serving large groups, the latter providing links between a transmitter(s) and specific reception points.

It must be repeated that this is an important element in the general development of the technical and organisational structures of electronic media: the dividing lines between broadcasting and point to point links, and between communal and individual services will become blurred as networks interconnect to form, ultimately, closely integrated systems. One of the principle factors of this development will be the extension, indeed the perfection of cable systems,

II. CABLE SYSTEMS

This system comprises two types of complementary network: one is known as "narrow band" on account of its limited transmission capacity (eg the telephone); the other is known as "broad band" as the use of copper, and soon of fibre optic coaxial conductors provides it with a considerable transmission potential.

Although the telephone network has a lower capacity in terms of the number of simultaneously transmitted signals, it has the advantage of being completely in-eractive: it enables the user to have a two-way communication with the network centre and with other users. As regards television cables, tree-structured networks will have to be replaced by networks constructed in space so that bidirectional and multidirectional interactive services can be organised.

Narrow band network: the telephone

The telephone made its appearance in the audio-visual field when it became possible to connect it to HOME TELEVISION SETS, Its presence on the periphery of social communication systems will strengthen the political role of the telephone authorities, a role that was initially exclusively technical but whose economic and cultural influence is beyond question.

The type of network determines the capacity of telematic systems designed for the general public:

- HERTZIAN (broadcasting cf p. 9 bis) NETWORKS

  They have only limited potential when teletext is broadcast at the same time as programmes (a few hundred pages) (1)

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(1) In theory, it is possible to devote an entire television channel to the transmission of teletext (10,000-15,000 pages). However few television organisations will allow one of their frequencies - which are rare - and and entire network of transmitters to be used exclusively for teletext. Nonetheless, local transmitters may, as in France, be used for specialised teletext services.

- COAXIAL CABLE NETWORKS

  Containing many channels, these networks have a potentially higher capacity as between 10,000 and 15,000 pages may be transmitted in a fully operational channel. The quantitative possibilities of interactive systems will be unlimited owing to the two-way communication between the user and the computers.

- THE TELEPHONE NETWORK

  This network is now interactive: its data communication potential depend mainly on the capacity of the computers serving it.

There is now a tendency to simplify terminology by using the generic term VIDEOTEX for all systems, while distinguishing between broadcast VIDEOTEX (a unidirectional system transmitted on a transmitter or cable network) and "interactive" VIDEOTEX (a bidirectional system operating by telephone or on cable).

INTERACTIVE VIDEOTEX, which has already been tested on the telephone network, will be the most promising service in the technico-economic sense. Moreover, it will be one of the principle means of expansion of the PTT.

PRESTEL/United Kingdom is the oldest system. It contains more than 200,000 pages offered by several hundred information suppliers. However, as the number of subscribers has scarcely reached the predicted number, a number of data bank service centres have been closed. Operational policy will very probably be increasingly directed towards the business sector.

In France, a trial project involving the TELETEL system has been underway in Vélizy (Yvelines) since July 1981, aimed exclusively at the general public (2,500 terminals).

Tests are being carried out to finalise an ELECTRONIC DIRECTORY service which should cater for some 300,000 subscribers in 1982/83.

In Germany, the Bundespost began two BILDSCHIRMTEXT experiments in June 1980 both involving 3,000 subscribers in Berlin and Düsseldorf (2,000 private homes and 1,000 professional participants). The system will be extended to cover the business communication sector of the entire country from 1983.

Other countries have begun testing interactive videotex: Scandinavian countries (TELEDATA), the Netherlands (VIDITEL), Austria ...

The technical potential of the systems requires specialisation of content. Broadcast videotex, which is unidirectional and quantitatively limited, provides information for the general public which becomes rapidly out of date. On the other hand, interactive videotex includes a large variety of services for specific audiences, especially professional. Not only is CONSULTATION possible but BUSINESS TRANSACTIONS may also be carried out: banking operations, purchases etc. This particular dimension of the system means that it will tend to have a mainly commercial role: many "suppliers" regard it above all as a promotion and sales media. The future, they say, is in electronic sales.

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Examples of BROADCAST VIDEOTEX SYSTEMS (by hertzian waves) and TWO-WAY VIDEOTEX SYSTEMS (by the telephone network)

	NAME	TYPE OF SYSTEM	OPERATOR
UNITED KINGDOM	CEEFAX	Broadcast	* BBC
	ORACLE	Broadcast	* IBA/ITV
	PRESTEL	Two-way	British Telecom
FRANCE	ANTIOPE-Services	Broadcast	TDF (Télédiffusion de France)
	TELETEL	Two-way	DGT (Direction Générale des communications)
FEDERAL REPUBLIC OF GERMANY	VIDEOTEXT	Broadcast	* ARD * ZDF
	BILDSCHIRMTEXT	Two-way	Bundespost
AUSTRIA	TELETEXT	Broadcast	* ORF
	BILDSCHIRMTEXT	Two-way	PTT
NETHERLANDS	TELETEKST	Broadcast	* NOS
	VIDITEL	Two-way	PTT
BELGIUM	TELETEKST	Broadcast	* BRT
	PERCEVAL	Broadcast	* RTBF
SWITZERLAND	VIDEOTEXT	Broadcast	* SRG
FINLAND	TELSET	Two-way	Private Bodies

NB A name preceded by * means a broadcasting organisation.

Wide band network: three generations

Three technological generations of wide band cable networks can be distinguished:

PASSIVE SYSTEMS which collect and rebroadcast existing programmes; ACTIVE SYSTEMS which produce and broadcast original programmes and INTERACTIVE SYSTEMS which exchange messages in both directions.

FIRST GENERATION: TRANSFRONTIER FLOW

The success of first generation cable is based on the importation of foreign channels, especially in small countries.

Belgium, being 80% cabled, is the European country in which cable television has had the greatest impact and is followed by the Netherlands (60%) and Switzerland (55%).

Cable is little used in Great Britain (13%), France and Germany but these countries are planning to use it intensively (1). Germany has undertaken four pilot coaxial network projects (in Berlin, Dortmund, Ludwigshafen and Munich), otherwise relying on fibre optic cable. (2)

France, while it has experimented in fibre optic cable in Biarritz and Lille, is installing copper networks in some big cities. Some predict that one French home in two will be cabled by 1990.

SECOND GENERATION: IN BETWEEN CULTURE AND TRADE

The first original function of the active cable was local programming. There was a certain enthusiasm in the 70's in Europe about the idea of a television service that was not only local but also community: ie a television service run by members of a locality in accordance with the maxim by the people and for the people.

- Imported from North America, this idea was the subject of a series of experiments in the United Kingdom, the Netherlands, Sweden, Switzerland and Italy; most of these were suspended due to lack of resources although some had clearly shown the usefulness of producing another type of television service.

Today, only in Belgium are there regular experiments in local and community cable television. About 10 stations that were licensed in 1976 operate in the French-speaking part of the country. Managed by mixed bodies, their aim is to provide local authorities with a means of independent expression. They are financed by the minister responsible for culture but some television services are granted financial assistance by local authorities or educational and social organisations.

- Only traces of community experiments in England and the Netherlands remain: occasional programmes and a few video groups. However, cable television in Holland is invaded every evening by hundreds of "video pirates" who beam "X" and Kung-Fu films, Westerns ... and advertising towards the aerial positions of cable networks.

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(1) In Great Britain an inquiry was held in 1982 at the government's request into the way in which future cable systems should be regulated and supervised.

(2) cf. pp 15-16

As from next autumn, a new Act will prohibit these practices but the government will have to adopt an open-minded overall policy to take account of new demands for cable activities.

A first step towards a more open cable system has been taken in the United Kingdom where 12 "pay television" experiments have been granted licences. These experiments have been limited to two years, include a research programme on their results and are being carried out by five pirate operators (1). The Rediffusion Company began the first experiment, STARVIEW, in September 1981. The same company has received a licence to begin a "pay TV" system in Switzerland.

Europe is thus about to follow in the footsteps of American cable television: PAY-TV in America is already the shining star of the audio-visual media.

Three factors have recently encouraged the rapid extension of American cable networks:

- *diversification of the services in terms of audience or subject matter;*
- the synergetic interconnection of cable with satellites, guaranteeing these services a very wide distribution;
- a new-liberal deregulation policy aimed at re-establishing the natural laws of the market in the media sector.

In 1981, 26% of TV homes, ie about 21 million subscribers, were connected to cable. This year that figure will reach 30%, the percentage traditionally regarded as signalling the arrival of a mass media in the United States. According to optimistic forecasts, the first saturation level, ie 80%, will already be reached by 1985.

One of the main advantages of cable is undoubtedly PAY-TV. Fourteen million subscribers to cable are today receiving pay television services, which represent 50% of world revenue in this sector, and according to some estimates, the American public will pay no less than 15 billion dollars for these services in 1990 (2).

HOME BOX OFFICE: HBO, a branch of the Time Inc. Group has provided the basic model: a service offering cinema, sport and variety programmes without commercial breaks on payment of a monthly subscription.

HBO's success (10 million subscribers) has rapidly been acknowledged by three types of concerns:

- existing media concerns: the cinema, including all the Hollywood heavyweights, publishing groups, and quite recently, Hertzian television services (seeking to make up for real or potential audience losses) (3);

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(1) As well as by BRITISH TELECOM.

(2) cf. Fred COHEN, Home Box Office/TIME Inc., International Institute of Communications Annual Conference, Strasbourg, 7-10 September 1981.

(3) According to NIELSEN, their world audience has been reduced to 16%, cf "Why Advertisers are rushing to Cable TV", BUSINESS WEEK, 26 Oct. 1981.

- cable television companies, and following them, the electronics industry. Fifteen cable television companies out of approximately 5,000 account for about 75% of the subscribers;

- firms outside the communication world: financial institutions such as AMERICAN EXPRESS (connected with the WARNER COMMUNICATION GROUP) or large oil conglomerates such as GETTY OIL (linked to ABC VIDEO).

Other services provided by cable have developed alongside pay-TV. Pay cable must be distinguished from basic cable:

Basic cable services

In addition to relays of the major hertzian networks, these include local and community programmes (it is estimated that by 1990 they will represent no more than 10% of the total), educational programmes and a series of new services financed wholly or partly by advertising: sport, information, arts and culture, music and variety. programmes for women, old people, children, linguistic and ethnic communities and religious programmes (and "super stations").

Most advertising investment in cable television is concentrated on the SUPER STATIONS, ie local television stations which cover very wide areas by being connected to satellite. The oldest station - TURNER BROADCASTING's WTBS of Atlanta has the widest audience (15% of American TV homes), particularly because it operates through SATCOM 1, the satellite received by the greatest number of cable networks.

Pay cable services

These services are organised either on a pay-per-channel or pay-per-view basis. The second formula, which seems to open up particularly lucrative horizons, is still only at an experimental stage as it requires sophisticated decoders. The main services offer continuous screening of films, films for adults, sport, cultural programmes and continuous news (in the form of texts and fixed images).

Scarcely one year ago there were approximately 40 cable satellite networks, now known as SATCABLE. Today there are more than 80 and in view of the projects announced to date, there will soon be easily more than 100.

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1. THE MAIN PAY-TV SERVICES

NAME	TYPE OF SERVICE	COMPANY
- HOME BOX OFFICE	Films, variety, sport	TIME Inc.
- CINEMAX	Films	TIME Inc.
- SHOWTIME	Films, variety	WESTINGHOUSE-VIACOM
- THE MOVIE CHANNEL	Films	WARNER-AMEX
- HOME THEATER NETWORK	Films	WESTINGHOUSE-TELEPROMPTER
- SPOTLIGHT	Films	TIMES MIRROR, COX-CABLE
- ESCAPADE (THE PLAY-BOY CHANNEL)	Films for adults	CABLEVISION, PLAY-BOY ENTERPRISES Inc.
- PRIVATE SCREENINGS	Films for adults	GROUPE SATONI
- GALAVISION	Films, variety and sport in Spanish	S.I.N. Inc.
- BRAVO	Foreign films, drama, dance, concerts	CABLEVISION, COX-CABLE
- ENTERTAINMENT CHANNEL	"Cultural" programmes (1)	ROCKEFELLER CENTER Inc RTCV and BBC
- REUTER'S NEWS VIEW	Continuous news (alphanumerical)	AGENCE REUTER
- NORTH AMERICAN NEWSTIME	Continuous news (text and fixed images)	UPI - NEWSWIRE

2. THE PRINCIPLE BASIC CABLE SERVICES

(Most of these services include advertising)

- ESPN	Sports	GETTY OIL - ABC VIDEO
- USA-NETWORK	Sports, variety	TIME Inc, PARAMOUNT
- SPORTS CHANNEL	Sports	CABLEVISION, MCA
- ARTS	Cultural programmes	ABC VIDEO - WARNER AMEX SATELLITE ENTERTAINMENT
- CBS - CABLE	Cultural programmes	CBS
- CABLE NEWS NETWORK/CNN	Continuous news (full video)	TURNER BROADCASTING
- CNN 2	News headlines	TURNER BROADCASTING
- SATELLITE NEWS CHANNEL	News headlines	WESTINGHOUSE - ABC-VIDEO
- C-SPAN	Public information network with live retransmission from the American congress	

NAME	TYPE OF SERVICE	COMPANY
- WEATHER CHANNEL	Weather forecasts	LANDMARK COMMUNICATIONS
- HEALTH CHANNEL	Programmes on health	VIACOM
- MTV/MUSIC TELEVISION	"Rock video" in stereo (for 18-24 year olds)	WARNER AMEX
- MODERN SATELLITE NETWORK	Programmes for women	MODERN TALKING PICTURE SERVICE
- BLACK ENTERTAINMENT CHANNEL	Films, sport, variety for blacks	BLACK ENTERTAINMENT
- SIN TELEVISION NETWORK	Different programmes in Spanish	SIN Inc.
- CBN SATELLITE NETWORK	Family (and religious) programmes	CHRISTIAN BROADCAST NETWORK
- WTBS-ATLANTA	"Superstation": films, sport, variety	TURNER BROADCASTING
- WGN-CHICAGO	"Superstation": films, sport, variety	THE TRIBUNE Co

(1) Cultural programming corresponds to a great extent to the average schedule of European television services.

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THIRD GENERATION: FROM CABLE SHOPPING TO BIGFON

Less than 1% of American TV homes are connected to an "interactive" or "bidirectional" cable (or satcable) system.

However, more and more experiments are being carried out, particularly on the initiative of data-processing companies - as computers play a fundamental role in interactive television.

The best known project - and the one that has become a real text book experiment thanks to major advertising - has been operated for more than four years by WARNER AMEX in Columbia/Ohio. Known as "QUBE" (from "question your tube"), it is comprised of some 30 channels and enables the public to take part in programmes by means of a reverse channel and a press-button system.

The QUBE has had such an effect that interactivity has become BIG BUSINESS in the United States: it is now used as a socio-cultural argument in support of any project submitted to the municipal authorities of cities without cable. In fact, its real advantage for those promoting it lies above all in its direct electronic sale and cable shopping potential, and in other useful services. Some predictions say that profit from these services will reach more than three times that of pay television (1).

Most existing systems provide only limited interactivity. Full audio-visual dialogue with moving images will become possible with the advent of fibre optic networks.

So-called "optical" cables, tested for telephone links and data transmission, are still hardly used in the audio-visual media. The only project of any importance is the HI-OVIS network (2) in HIGASHI-IKOMA, Japan. This project, promoted by the public authorities, is intended to enliven community life in a neighbourhood of a dormitory town just outside Osaka. It is innovative in that participation on the "dialogue" channel is through speech and images: in each home, a camera provides visual communication with the central studio and with other subscribers.

Although the technology in this field is still unreliable and expensive, optical cable does have advantages which play an important political role in Europe. Some countries such as GERMANY are hesitant about undertaking an extensive copper network development and have decided to wait for optical networks that integrate all present and future modes of communication.

In France, fibre optic is presently being introduced on a large scale in Biarritz (RNIS = Réseau numérique à intégration des services). The experiment has two initial aims, to test the equipment and to measure public reaction to VISIOPHONE (the main new development being tested). Limited to 1,500 subscribers in 1983, it should subsequently cover all 28,000 inhabitants of the city, while adding telematic services with moving images to radio and television programmes.

Another opto-electronic network is being installed in Lille which is concentrated more on television applications (there is provision for about 30 video channels).

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(1) D. BURNHAM "The Twist in Two-Way Cable", CHANNELS Vol I, No 2, June-July 1981.

(2) Higashi-Ikoma Optical Visual Information System.

Besides these projects however, the authorities in France are giving priority to the development of the professional applications of fibre optic, particularly in a network aimed at providing communication between firms, television teaching and long distance work by computer. This network would be an indispensable relay in the first French commercial satellite, TELECOM 1.

Also in GERMANY, the government is directing new technology towards professional uses (Geschäftskommunikation) simultaneously with social communication. This is being done in the framework of the BIGFON (Breitbandiges Intergrierters Glasfaserfernmelde Ortsnetz) project involving the installation of 10 networks in seven cities between 1982 and 1986. Each network will provide digital telephone, telex, data transmission, videotext, telefax and picture-phone services; at a later stage it will provide access to 12 video programmes and 24 audio programmes. ..

BIGFON will thus be able to integrate individual and communal services, ie telecommunication and broadcasting, a fact with political implications that have scarcely been tackled. Thus, an apparently exclusively technological investment is quietly developing monster megasystems of the future (1).

III. THE VIDEO SYSTEM

Video is a polysemous expression which can mean many different things depending on how it is used. These uses tend to be mixed up together in the form of market statistics, technological analyses and speculation on commercial strategies.

Scarcely 10 years ago VIDEO was a synonym for anti-culture or for "alternative" production. It was the instrument of the first community television and collective expression experiments that were full of promises as much as illusions ...

"Light" VIDEO then revolutionised news. As anti-culture markets had proved unprofitable, industry was looking for outlets in radio and television organisations. It was offering them electronic equipment for new reporting: the so-called "ENG" (electronic news gathering) equipment.

Since then, light video has established itself among professional users, a group which has expanded well beyond traditional institutions owing to the appearance of many independent producers.

At the same time it has made semi-professional productions possible in firms, institutions, and in educational and cultural activities.

However, VIDEO today hardly brings to mind the idea of producing, but rather of consuming ready-made products. Based on commercial criteria, it is the opposite to what the original converts had imagined. Its two components are the video recorder with half-inch cassettes and, soon, the video disc.

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(1) An investment of up to 100 million DM providing up to 40,000 jobs (according to the PTT Minister).

Only in the past two years has a general video market emerged in Europe, as the supply of machines (hardware) came well before the supply of programmes (software).

Two major standard types of video recorders have been established, both of Japanese origin: the VHS, made by the Victor company and the BETA format by Sony. They have temporarily put an end to the proliferation of incompatible technical standards, which for a long time delayed the development of sales. European industries however are trying to counteract this by introducing a third format - the VIDEO 2000 from Philips - which is beginning to have considerable impact on some markets.

In Europe, households that have a video recorder account today for approximately 5 to 10% of the TV population; the most rapid developments seem to be taking place in the Swedish and Federal German markets. Some forecasts point to a video "penetration rate" of close to 30% for 1985, which would put Europe at the top of the world market.

However, programmes today still play only a secondary role on the video market, in Europe and America. All the surveys show that video recorders are used above all to record television programmes. It is significant to see what types of programmes are recorded from television: mostly FEATURE FILMS (70 to 80%) - and generally westerns, detective, adventure and psychological films. Close behind are retransmissions of sporting events, whereas specific interest programmes (cultural and political information, programmes for young people and children) are at the bottom of the ratings.

It will thus be noted that when the viewer is provided with the means to make selective use of television according to his own interests, he merely strengthens the demand for mass programmes with the widest common denominator.

Can the development of a real supply of pre-recorded programmes based on ORIGINAL productions change this pattern?

The only original video programmes which have a real impact on the market can be summed up in the slogan "ACTION, SEX AND VIOLENCE". VIDEO FOR ADULTS started the market off and it still constitutes 40% (1) of the total supply. Other types of video programmes include principally cinema films and television programmes: at the moment, video is above all a means of reproducing or recycling products that have already been written off elsewhere.

Firstly, it recycles CINEMA products and principally, the products of the American cinema. All the MAJOR Hollywood firms have established their presence in European video, ingeniously exploiting the confusion of transmedia and transnational link-ups and acquisition of interests (2).

Thus video in Europe today can be summarised as JAPANESE HARDWARE OFFERING AMERICAN SOFTWARE.

While being a second type of cinema, video is also a second type of television service. It enables televised programmes which often have only a short screening time to be given a longer life. The French, Belgian, Swedish and British (...) television services are trying to reassert the value of a creative heritage financed by the public.

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(1) Percentages vary according to the sources, a variation which may also depend upon one's definition of "X".

(2) Cf. pp 46-50.

Whereas video today is essentially a means of duplicating pre-existing products, the rigid organisation of the market makes original production difficult. For the moment, such productions are really only possible in the institutional sector and in certain occupations where their cost is reduced by the presence of solvent audiences or by an intensive use by local groups.

The economic restraints on the general market often seem prohibitive and prices too high. It is a vicious circle because without a public, there are no programmes, but without a supply of attractive programmes there can be no public. However, original test programmes have recently appeared in audio-visual publishing under the impetus of various producers: musical, newspaper and book publishing, but also certain sectors of the cinema and television ... Independent production companies are being set up and are intending to supply not only video cassettes and discs but also satellites and cables. Their plans take them way beyond national frontiers towards an internationalisation of markets: in fact this is what will guarantee them sufficiently wide audiences and a profit for their products.

Three major trends can be noted today in original video publishing:

The development of a new electronic press in the form of VIDEO MAGAZINES (1).

The proliferation of "how to" SERVICES: cookery, sport, gardening, do-it-yourself, languages ...

The beginning of CULTURAL, and particularly musical production - music fits in perfectly with the international plans of producers.

However, musical producers are relying more heavily on the VIDEO-DISC, which could offer a better sound quality than the cassette.

Of the many standards developed for the video disc, only three have any possibility of success today: SELECTAVISION/RCA and VIDEO LONG PLAYING/VLP from Philips-MCA, and VIDEO HIGH DENSITY/VHD from Japan's Victor company.

Like video recorders, existing systems are incompatible. As there are considerable economic interests at stake, the strategy adopted by industrial groups is to create a balance of power favouring one system or the other. Everyone is trying to control as much of the market as possible by means of co-operation agreements and assignment of licenses.

However, PROGRAMME agreements determine market capacity. Unlike what happened when video recorders were commercialised, disc manufacturers have immediately ensured that they have access to substantial software sources. In fact the success of the respective systems will to a great extent depend on the quality of the first catalogues.

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(1) For a detailed analysis of the video magazines, see Francoise Lerousse "Une nouvelle presse électronique: les vidéomagazines", VIDEODOC, Brussels, nos 46-49, Oct 81, Feb 82.

Since the relative failure of the first disc launched on the market, SELECTAVISION/RCA - which sold 65,000 sets in 1981 (1) in the United States - predictions which had announced a penetration rate of 5-7% for 1985 are becoming more cautious. Many observers questioned the competitiveness of the disc in relation to the video recorder, which has the advantage of being able to RECORD and REPRODUCE, an advantage which in the eyes of many consumers today justifies a greater expense (2). Will the big advantage of the video-disc, its price (3), be decisive in gaining wider audiences at a later stage? In any case RCA is basing its long-term strategy on this eventuality.

Ultimately, the real innovation of the disc consists in its RANDOM ACCESS and COMPUTER INTERFACE potential, making it a unique instrument for storage and for teaching and occupational training (4). These possibilities will however continue to be restricted to institutional and business use. Except however for video games ...

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The three media systems reach the family set by means of many channels. That set will in future change its role and function and will simply be the central link in a multi-accessory video system.

These accessories, by connecting the conventional set with new sources of images, will form what is known in France as "péri-télévision".

Some important categories of "peripherals" can be distinguished: those giving access to the major communal, hertzian and cable broadcasting networks; those which constitute media for individual use, outside the networks: video games, video recorders, video-discs, film and slide projectors; those enabling services to be received on request: videotex, pay television, electronic message service and those dealing specifically with home data-processing: micro computer, printout and interactive videotex and videodisc.

An adapter has already been developed so that the various appliances can have access to the terminal receiver of the future home communications centre ...

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(1) Instead of the 250,000 estimated for the end of 1981.

(2) In respect of the disc, it seems however that technology does exist to enable users to record and delete. However, being based on the application of the laser, it is extremely complicated (and expensive) and commercialisation is not envisaged for many years.

(3) Today, half the price of a cassette, but hopefully a fifth or a tenth at a later stage.

(4) A single laser optical disc can hold 10 billion bits of information on 108,000 fixed pictures, or two hours of animated sequences, or 20 hours of audio recording.

A "PERI-TELEVISION" SCHEME

TELEVISION SET

- Antenna to receive TV broadcasts over the air
- Receiver and adaptor for SATELLITE broadcasts
- Reception set for Cable TV
- Video Tape Recorder
- Video disc replay
- Video games
- Replay of films, slides, photographs
- VIDEOTEX adaptor - one way
  - two way
  + telephone
- Pay TV adaptor
- Electronic mail set
- Furthermore: video camera (protection)

  various elements of a sound hi-fi system

N.B. Some parts may include others, such as Cable TV which may include terrestrial broadcast radio as well as satellite television. The combinations will depend of course on available services as well as on the means and attitudes of users confronted with these "video taps".

SECOND PART: The Interactions

New communications machines will be fighting for a limited market: predictions, even optimistic ones, show that in 1990 that market will absorb only a small part of the potential supply in Europe (1). However, the paradox is that the media will have to rely on one another in order to establish themselves on the market.

Cable will need hertzian television and satellite will not be able to do without cable; video will draw on hertzian and cable networks, while at the same time enriching them with new products ... The media will constantly fluctuate in an ambiguous pattern between two extremes: competition and complementarity. This is after all an ordinary dialectical process, but its effects will also impinge upon the press, the cinema, records, books ... The cinema and the press, seriously affected by changes in the audio-visual sphere, intend moreover to take an active part in those changes, thus making the pattern of interdependence even more complex.

Only an outline can be given here of this pattern: ie the major tendencies illustrated by important examples. Three types of interaction enable an initial typology to be outlined of the relations between the media as they are perceptible today: SUBSTITUTION, ASSOCIATION and INTEGRATION.

It is precisely through the substitutive, associative or integrationist tendencies in the media that the main vehicles of change in the economic, cultural and political structures of our communication systems appear.

I. SUBSTITUTIVE TENDENCIES

These aim at establishing COMPETITIVE relations, usually with conventional radio and television organisations. They have a double objective: institutionally to abolish existing monopolies and economically to break the monopoly of the public service in favour of commercial initiatives. The means are varied: in Italy, PRIVATE LOCAL RADIO AND TELEVISION stations have organised themselves into national networks; in Belgium and Canada, TRANSFRONTIER CABLE TELEVISION imports commercial programmes. In Germany, CABLE SATELLITE COMBINATION PROJECTS both from inside and outside the country threaten to affect existing radio and television.

A. Italy: from complementarity to competition

In 1976 the Italian Constitutional Court authorised free radio and television at local level: national broadcasting was to remain within the control of the RAI. The Court further held that local stations would be subject to a licensing system laid down by Parliament. However, none of the numerous bills were passed into law because of the political instability in the country and there is a tendency to abandon forever the impossible model of "a thousand local flowers" (2).

The misapplication of the initial objective of freeing the waves appears most strikingly in television.

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(1) Estimated at 20%, eg by the PROGNOS Institute, Basle.

(2) The PTT Minister, Vittorio Colombo, in Florence, 1979.

This dual objective has twice been frustrated:

- The desire to set up an alternative social and cultural television service led to excessively commercialised television that propagated the mass-production values from across the Atlantic. "Freedom of expression and the right to communicate have little, if anything, to do with the motivations and activities of the great majority of the private stations presently operating in Italy" (1).

- The desire to establish means of expression adapted to the needs of local communities - especially under-privileged communities - was totally undermined by the development of supraregional and even national networks. The central question now for the audio-visual media in Italy is the final renunciation of the principle of complementarity between public and private, and national and local radio and television, - a complementarity that had become entirely fictional - and the final acceptance of competition.

Several types of network linked by many interconnected interests can be distinguished:

The TECHNICAL NETWORKS, whose stations are interconnected by microwave relays, are similar to American networks, having affiliated networks and associated service companies. Although they operate completely illegally, they are making progress: their owners have not given up the hope of being legalised.

PROGRAMME DISTRIBUTION NETWORKS are broadcast in turn or simultaneously by several stations.

Finally, there are SERVICE NETWORKS that deal in programmes, often in co-operation with advertising agencies who sell both pre-packaged advertising and programmes.

Ninety per cent of the programmes are productions from outside the stations, and even outside Italy. The major networks obtain enormous supplies in the United States, spending large sums to rob the RAI of series such as Charlie's Angels or Dallas ...

More than 85% of Italians have stated that they watch FICTION (1) above all else. Private stations show mainly films and serials which account for more than eight hours per day out of the 14 hours of programmes that medium and large stations offer (2), ie approximately 60% of the total time (according to the calculations of the review MILLE CANALI, some 10,000 films - apart from serials and cartoons - were shown by private stations up to March 1981).

Less than 5% of the programme time of all the stations is devoted to news, and only 2% by the biggest stations. The rest of the time is taken up by variety shows, an endless number of games and spectator sports: a very highly prized item and one which leads to a real race between the RAI and the private stations, causing a dangerous escalation of costs.

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(1) Alessandro SILJ, "Italy's first few years of private television broadcasting", Intermedia, Sept. 1981, p. 12.

(2) Alessandro SILJ, ibidem.

(Recently, Silvio Berlusconi, the owner of the network CANALI 5, was prepared to negotiate the exclusive rights for the Italian football championship of 1981/82 by offering more than three times the price usually paid by the RAI; the latter finally obtained the exclusive rights but had to match Berlusconi's price. In radio and television, competition is expensive ...).

Italian viewers are grateful to private stations for their concern about programmes. The viewing public was recently divided up as follows: RAI: 49 million viewers; private television: 23 million (1).

These figures seem to indicate a slight reduction in the viewing audience of "private" stations, undoubtedly due to the collapse of small stations in the face of big networks carrying supra-regional advertising. It is generally thought that the process of concentration will continue and that only about 100 stations will survive, grouped into two or three nationwide networks.

B. Belgium and Canada: what is at stake in transfrontier broadcasting

In Belgium, 80% of homes receive up to 15 television channels by cable: in addition to national channels (4), there are three channels from France, two from the Netherlands, three from Germany, one from Luxembourg and one or two from the United Kingdom.

Cable is regulated in law by a royal decree of 1966, which prohibits cable operators from presenting their own programmes and from retransmitting advertising contained in foreign programmes (in accordance with the prohibition against advertising on national radio and television).

Economic implications: "foreign commercialisation"

As the prohibition against advertising has not been complied with for a long time, contradictory judgments have been delivered at the conclusion of proceedings instituted by consumer organisations. The contradictions were due to the courts' uncertainty about how to interpret Belgian legislation in the light of the provisions of the Treaty of Rome concerning the free movement of services.

This uncertainty was removed by the Court of Justice of European Communities in Luxembourg, when it confirmed the lawfulness of prohibiting advertising by cable, in its sitting of 18 March 1980: "... if those rules are applied without distinction as regards the origin, whether national or foreign, of those advertisements, the nationality of the person providing the service, or the place where he is established."

Following this judgment, the trial court in Belgium convicted cable operators who had unsuccessfully appealed to the Court of Cassation. Pending the (improbable) enforcement of the law, "Tele-Luxembourg" in particular, as a purely commercial television company, benefitted from the Belgian authorities' permissive attitude. A branch of the Compagnie Luxembourgeoise de Television/CLT, Tele-Luxembourg's advertising targets show that it has become a mainly Belgian channel thanks to cable: it draws more than 70% of its revenue from French-speaking Belgium.

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(1) "First rating, last rites", TV World. London, Oct. 1981, p. 44 (ISTEL survey).

A doubt has been cast on RTL's advertising monopoly in Belgium by the Belgian Government's decision (of March 1981) to introduce advertising on national radio and television. However, this decision led to problems precisely because of RTL's presence on the Belgian market. Regulations in an initial bill provided for the separation of advertising from programmes, the prohibition of commercial breaks during programmes and of sponsored programmes; the bill was supposed to apply to all channels aimed principally at the Belgian market. It thus prohibited Belgian continuity announcers from engaging in advertising on channels that did not comply with the statutory provisions in force in the country. It was clear that these provisions were aimed at RTL, whose programmes were regularly interrupted by advertising; the other channels received in Belgium comply with rules similar to those proposed for Belgian television, rules regarded as fundamental for all public service bodies.

Thus, very loud protests were made not only by the RTL/LCT authorities, but also by the government of the Grand Duchy. At the instistence of his Luxembourg counterpart, the Belgian Prime Minister finally agreed that an intergovernmental committee be set up for the purposes of mutual information ...

Although it had been decided in autumn 1981 to introduce advertising, the problem remains undecided (1).

Belgium has accordingly, it seems, difficulty in pursuing an independent policy in this field: politico-financial interests overlap beyond national frontiers, preventing Belgium from avoiding certain forms of commercialisation from abroad (known in Germany as "Fremdkommerzialisierung")(2).

Cultural implications: "Dallas every day"

What some regard as a veritable colonisation also has cultural implications. The number and structure of programmes that can be received in French-speaking Belgium have had a considerable influence on public behaviour and consequently on national television policy (3).

The following overall developments have taken place in recent years:

- Despite the increase in the number of programmes, the public's daily viewing period has increased very little; within that period however, the place taken by the different categories of programmes has clearly changed.

- The major beneficiaries of this are entertainment and fiction programmes. The consumption of variety and games programmes which have increased in number, has doubled in a few years. Commercial films enjoy considerable success; the public has a choice every day of at least five or six films.

- Original works of fiction (television films and serials) have lost much. On the other hand American television is well established. Every evening one can admire on at least one channel the frolicking of the gentlemen of Dallas ...

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(1) Meanwhile, there were elections in Belgium and the new governmental coalition seemed particularly aware of the interests of the CLT ...

(2) Although CLT is not entirely "foreign", since the biggest block of shares is in the hands of the Belgian company Bruxelles-Lambert.

(3) Only French-speaking television will be dealt with here, as it is more exposed to competition than Dutch-speaking television.

- As regards information, the public has remained loyal to television news programmes, the most popular programme on national television. On the other hand, it has tended to lose interest in most weekly programmes on specific subjects. One consolation is that when the public looks for news, it looks to national television; news on foreign channels attracts the public only on exceptional occasions.

- The major victims of a wealth of television are cultural and educational programmes whose audiences have been constantly dropping.

In short, with the increase in the number of programmes the public is turning increasingly towards entertainment and fiction (notions which partly overlap). It still watches daily news bulletins but is neglecting other news programmes. Finally, it seems less drawn to "culture".

While there is an even wider choice of programmes, the choice of the public becomes more and more restricted: this is not only the case in Belgium; it has been borne out by a study recently carried out in countries having a rich supply of programmes.

National television has had to adapt itself. Having lost a third of its public, it remains ahead of its rivals by relying above all on daily news, films (1), variety, games and sports programmes - in short, a schedule of programmes largely determined by foreign interests ...

However, national television is not simply conforming, an approach which might threaten its public service element with disappearance. It is taking specific initiatives as part of a special plan: regionalisation, original cable programming ...

It is not certain however that it will have the necessary resources to complete its projects. Its current budget is insufficient to permit a dynamic policy. However, the - hypothetical - support of advertising will be negligeable as the market has already been substantially taken over by foreign interests. THUS THE CULTURAL AND ECONOMIC EFFECTS OF TRANSFRONTIER COMPETITION REVOLVE IN A VICIOUS CIRCLE ...

The "Frontier War" in North America

On an infinitely larger scale, Canada is faced with the same problems, subject naturally to variations peculiar to the North American context.

Along with Belgium, Canada is one of the most cabled countries in the world: in the large cities close to the American border, cable has reached saturation point (more than 90%). However, as most of the Canadian population is concentrated in these areas it is therefore very exposed to American television imported both by cable and by direct channels.

In the face of the American competitor, Canadian radio and television - a dual system consisting of a public body, Société Radio Canada/SRC and a number of private stations - has lost much of its audience: according to certain sources, its audience is less than a third of the Canadian television public (2).

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(1) Cf. Michel SOUCHON, at the Colloquy "La Télévision et ses publics: nouvelles attentes, nouveaux programmes", INTERAUDIOVISUEL, Cannes, 25 April 1982.

(2) "English Canadians spend roughly 74% of their viewing time watching foreign programmes", Bernard OSTRY at the Annual Conference of the International Institute of Communication, Strasbourg, 7-10 Sept 1981.

Consequences: massive exportation of Canadian dollars spent in advertising on American stations; reduction in the number of original productions in Canada and doubts about the feasibility of private Canadian stations. There is deep concern in the country about its cultural and economic autonomy (1).

This concern has resulted in the setting up of the Consultative Committee on the Implications of Telecommunications for Canadian Sovereignty (CLYNE Commission), whose report was published in 1979.

A series of practical measures were then taken with the aim of counterbalancing transfrontier movements of audio-visual media. However, they have not all been successful. In short, they demonstrate the problem of self-defence in the face of American industry, which is driven solely by profit. This difficulty is a premonition for Europe, the next great target for the strategists of that industry ...

The aim of these measures is the CANADIANISATION of the broadcasting system which should, Parliament has stated, be effectively owned and controlled by Canadians so that the cultural, political, social and economic structure of Canada is protected, enriched and strengthened (2).

To this end it was decided to refuse tax exemptions in respect of Canadian advertising costs in American television stations. When even partially enforced, this measure led to the repatriation of some 20 million dollars every year to Canadian television stations.

To ensure a Canadian presence, quotas of home-produced programmes were imposed on television stations. Hence the proliferation of cheap entertainment: games, variety shows ...,

To encourage original productions, tax advantages have been granted to the film and television industry.

The result is that Canada has become what some refer to as the "Hollywood of the North", with American stars promoting Canadian films ...

Finally, cable operators have been required to relay only a limited number of American stations. This has given rise to discrimination - and bitter reaction - between the regions where American signals can be received live and the rest of the country, ...

John MEISEL, the Chairman of the Canadian Radio and Television Council CRTC, the supreme communications authority, maintains that there are only two solutions to this quasi-insoluble problem:

- the development of a production industry of international quality that would make programmes of interest to Canadians, a development supported by financial measures (including direct aid to producers and distributors).

- the recognition at international level of the need to qualify the value of the free flow of information by a concern for other factors such as national and cultural sovereignty ... (3).

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(1) This anxiety is extending to the field of cross-frontier DATA transmission, and its implications for the protection of the privacy of Canadians and the sovereignty of the state.

(2) cf Bernard OSTRY, ibidem.

(3) Cf. John MEISEL "Dans la foulée d'un géant", speech and debate during the Annual Conference of the International Institute of Communication, Strasbourg, 7-10 Sept. 1981.

C. Public media against private media: an important debate in Germany

The problem of transfrontier broadcasting, as we have seen, includes the problem of the opposition between public service television and commercial television; this is an imported opposition which many countries are henceforth likely to experience. Whereas in Belgium, such opposition was able to establish itself forcibly thanks to ambiguous political co-operation, other countries are determined not to yield to technico-economic determinism. In Germany especially, a wide debate has begun on the audio-visual media in which everybody involved in public life, from politicians to "citizens groups" is taking part (1). In a way, this debate is exemplary for other countries.

The dual question of the opposition between public and private services at national and transnational level arises in Germany:

- in respect of CABLE television, as some cable television pilot projects provide for access to be granted to private interest groups (Ludwigshafen and Munich);

- in respect of SATELLITES, on account of the Luxembourg project, which envisages a commercial programme aimed at German-speaking countries. The German daily newspapers have joined in this project, which must be seen in SYNERGETIC RELATION TO CABLE (cf pp 30 - 31).

The arguments for and against the new media are dividing political movements into two major groups in a way that is only superficially paradoxical:

- "conservative" groups and parties appear as the committed defenders of "INNOVATION", and "PROGRESS", as the latter offer new markets and prepare for the entry of commercial interests into radio and television, to date the private hunting ground of the public sector.

- On the other hand, "progressive" groups aim at restricting technological expansion as this threatens not only to "DE-STRUCTURE" the existing system, but also to encourage the increase in television consumption, regarded as dangerous for family and social life.

The various arguments developed by politicians are characteristic of the overall debate on the media in Europe. It is therefore useful to give a brief list of them:

"Growth" and "freedom"

The basic arguments come from the electronics industry, whose influence is increasing as the economic crisis worsens:

- German industry must remain COMPETITIVE against the Americans and the Japanese, who at the moment control most of the audio-visual market; competitiveness is especially important with the prospect of the development of enormous markets in the third world;

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(1) Bürgerinitiativen.

- moreover, the vitality of the electronics industry guarantee and creates EMPLOYMENT. Only the development of cable networks will be able to provide more than 100,000 jobs (1).

Connected to the technico-economic arguments are arguments of a politico-cultural nature in favour of opening the media to commercial interests.

It is a matter of urgency to bring about genuine pluralism in the audio-visual media, as public radio and television services lack objectivity. INDEPENDENT structures will provide the public with the guaranteed multilateral (or "neutral") information to which it has a right.

Pluralism will bring FREEDOM OF CHOICE. Everyone will at last find the programmes of his choice. Instead of imposing values, private television will adapt to public demand. Finally, as free competition stimulates creativity, the QUALITY of programmes can only improve.

"Mystification, alienation, impoverishments"

Opposition to these arguments is organised not only in political parties but also by various action groups which, backed by pamphlets and anti-media car stickers, are carrying out a campaign against "total television".

There is enormous investment in cable and satellite they say and it should be financed by the community. However, the latter is not asking for these media; on the contrary, it has MORE PRESSING NEEDS in other fields.

Industry should specialise in business communication technology (business telematics, office computerisation etc). In the long term, this kind of development will be more profitable than audio-visual services for the general public.

At a socio-cultural level, those known as "technoclasts" are opposed above all to the increase in the number of programmes:

- new programmes will have to be financed by advertising, leading to a broad commercialisation of the audio-visual media. Such commercialisation will provide large financial groups with the possibility of directing public opinion or even replacing the democratic process of public life.

- The commercialisation of programmes entails competition for the maximal audience. This will lead to a standardisation of programmes in accordance with the biggest common denominator.

- However, the denationalisation, competition and standardisation of programmes will strike at the very essence of the existing system, ie public radio and television.

As regards the competition between public and private television, a three stage scenario has become accepted as a term of reference (2):

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(1) Figure cited by the CDU Deputy Dieter Weirich in "Der Spiegel", no. 11/81.

(2) Outlined by Manfred Jenke, Director at Westdeutsche Rundfunk when Norddeutsche Rundfunk was threatened with dissolution by the Minister President of Schleswig-Holstein and Lower Saxony, and when private radio stations were being introduced in northern Germany. Published in Funk Report, 1 June 1979, 11/79, pp 3-4.

- Stage one: formation of a private radio and television company financed by advertising, alongside the public institution;

- Stage two: the private station gains an audience. The public body must choose between adapting to competition to hold on to the biggest possible audience or playing a complementary role by limiting itself to cultural and minority programmes;

- Stage three: the private station finally wins mass approval. On the other hand, the public company becomes impoverished due to a drop in advertising revenue, a political refusal to increase the licence fee. The question is asked why money should be spent on a minority television service when commercial television - which has most of the audience - costs the public NOTHING? (1)

This scenario inevitably leads to the public system being relegated to the fringes, the draining of its resources ...

II. ASSOCIATIVE TENDENCIES

We shall now approach the media from a different perspective to deal with their relations of complementarity by examining the use of their SYNERGY potential.

"Synergy" is apparently the key word and the means of conquering enormous audiences and promising markets ... In any case, it expresses a new conception of the media as being components of coherent communication systems - whether these systems are regarded from the commercial, cultural or social standpoint.

They can be associated in very different ways. The fusion of two electronic systems can give rise to a new media with a formidable impact: this is the satellite cable combination (SATCAB) which is about to revolutionise existing structures in the audio-visual media in North America - and for which some predice a bright future in Europe.

Another example, and one which goes beyond the electronic media is the diversification of the PRESS towards the AUDIO-VISUAL MEDIA, as a result both of a self-defence reflex and a desire to widen its conventional field of activity; coming out of the ghetto of the printed word, the press now intends to provide news on all appropriate systems ... As for the CINEMA, it is already becoming deeply involved in multi-media distribution, thanks to associative structures which enable it to recycle its products through technical systems which owe their existence today to the cinema (pay TV, video); this applies at least to the American cinema which has tightened its grip on the European market by means of the new media ...

A. The "Satellite-to-Cable" networks: more than a technical synergy

About 20 million Americans receive television daily via cable satellite systems, although this combination has only been technically possible for six years.

The rapid increase in SATCAB networks is now threatening the viability of both hertzian networks and local stations. A new advertising market is coming into existence on these networks and is taking substantial revenue away from hertzian media by means of highly "targeted" programming.

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(1) This political reasoning does not take into account the likely cost of commercial television in the market of consumer goods.

The proliferation of new services today is restricted only by the technical limitations of cable and satellites.

Seventy-five per cent of American cable systems carry no more than 12 channels, already to a large extent dominated by traditional services. Morover, these systems have only one or two spatial reception aerials and cannot therefore receive all the satellites offering them new services.

These problems will only be solved when the number of 30, 50 and 80-plus channel cable systems increases so that they are sufficiently wide-ranging to justify multi-directional aerial positions.

As for satellites, they do not seem capable of meeting all the demands of programmers. There are at the moment 10 "home" communications satellites in the United States, nine of which may be used for radio and television on a certain number of transmitters: SATCOM I, II and IV (SATCOM III has been lost in space), RCA Corporation, WESTAR I to IV, WESTERN UNION and COMSAT's COMSTAR I to III.

The FCC has authorised the launching of 20 more satellites between now and 1986, trebling the number of available transmitters. Almost all of these have already been sold (1) although the market will probably be able to absorb only 25% of the new programmes (2). The transmitter trade has become a business in itself, with specialised agents acting as intermediaries between constructors and programming companies. It is a lucrative business. For example, one transmitter on SATCOM I bought two years ago for less than $250,000 was sold 15 months later for 5.5 million dollars (3). It must be said that SATCOM I is the most sought after satellite because it is the best "installed": 3,000 ground stations receive it, as opposed to the 200 that receive COMSTAR I/2. For this reason it guarantees the success of the most important programmers: Home Box Office (Time), Showtime (Westinghouse), Cable News Network (Turner), Entertainment and Sports Programming Network (Getty/ABC) ...

Given that costs have escalated, satellites will undoubtedly be the winners in what is today known as the war in space on the American electronic communication market (4).

"The rich are getting richer and the poor are getting poorer" according to Robert Wold, President of one of the companies specialised in the resale of satellite transmitters; in other words an increasingly smaller number of firms will have increasing power ...

The first NETWORKS for Europe

There is no direct broadcasting satellite in the United States (5): cable draws exclusively on distribution or even telecommunication satellites.

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(1) On GALAXY I, owned by Hughes Communication International and with an individual programme cost of between eight and 15 dollars, six channels have already been sold to Time Inc., four to Westinghouse and two to Times Mirror-Turner Broadcasting and VIACOM (launching schedule for May 1983) respectively.

(2) "How Cable TV hinges on Satellites", Business Week, 14 Sept. 1981.

(3) By the Californian consultant Timothy Flynn to Warner Amex Satellite Entertainment.

(4) Business Week, ibidem.

(5) Except for some experimental satellites.

This example is beginning to find acceptance in Europe where it has been understood by some circles that it is not necessary to wait for the broadcasting satellites planned in Geneva in 1977. They are speculating on "birds" (1) that are more immediatley accessible in order to supply cable networks more or less everywhere in Europe: today on OTS II (cf p 5), tomorrow on the ECS series (European Communications Satellites) (2).

OTS II, launched in 1978, has come to an end and technical experiments have been completed, It does however retain some resources which may be exploited. With this in mind, a British commercial company Satellite Television Ltd has obtained a programme space of approximately 50 hours a week to provide a direct link between the United Kingdom and Malta ... it may be thought that this link, backed by British Telecom is only a pretext and that once the signals have been sent up to the satellite, they may be received all over Europe with appropriate aerials, particularly those installed in cable networks (3).

EURELSAT's (the European Telecommunications Authority) decision is controversial on two grounds: the fact firstly of granting a private commercial company transmission time on a satellite built from public funds and secondly, of allowing one of this telecommunications satellite's frequencies to be used for a purpose for which it was not intended (4). One precaution has however been taken: STL must code programmes sent towards Europe. Permission to decrypt programmes on reception depends on the respective governments ... However, in some countries the authorities have little control over the use of television signals in cable networks. The lock on the door giving access to OTS is therefore weak and may come off at any time.

"Television havens" (just as there are tax havens) are appearing in space, where some groups, by taking advantage of a certain political confusion, are preparing to organise the "wave trade" at European level.

The symbiosis with cable will also be advantageous to DIRECT BROADCASTING satellites: it will save the public the cost of expensive home aerials. For this reason countries like Great Britain and France are planning enormous cabling schemes contemporaneous with the launching of the first satellites. In Germany on the other hand, important political movements are opposed to the development of cable precisely because it facilitates the reception of satellites, especially commercial satellites from abroad.

This opposition is clearly aimed at the Luxembourg satellite project for which the German market would be one of the principle targets. This project is implicitly relying on cable, not only for reception but also for the organisation of programmes. In any case, on the basis of one of the established versions, it must be organised along the lines of the model of American networks: satellite would provide national or even European news and entertainment; regional and local programmes would be added by cable. Newspaper publishers would be among the privileged partners who would provide home-produced programmes.

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(1) A term which means satellites generally in the United States.

(2) Both developed by the European Space Agency.

(3) In the meantime, this link has been discontinued by Malta but this does not prevent "Satellite Television" from supplying its programmes to cable systems in Finland, Norway and Switzerland.

(4) Legally, it seems that the programme distributed by OTS would no longer be "broadcast".

THIS NETWORK WOULD THEREFORE BE THE BASIS FOR A DUAL SYNERGY: FIRSTLY OF TELEVISION AND PRESS AND SECONDLY OF SATELLITE AND CABLE.

This prospect, supported by the agreement concluded by the CLT and the Association of Daily Newspaper Publishers on the creation of a European television company (cf p 40), has led to a debate in Germany on what is now known as commercialisation from abroad. Those against the Luxembourg project argue that this "fremdcommerzialisierung" will destabilise national media, not as a result of a national political decision but on account of unacceptable interference from abroad.

This type of fear was expressed in the Netherlands, which was faced with the prospect of a Dutch-speaking television channel run by RTL, relayed firstly by cable and then by satellite.

The reaction was clear. The Dutch Government, in a draft policy document on the audio-visual media, stated that it intended to prevent "programmes being relayed by cable which are intended for Dutch audiences and are broadcast in competition with the programmes of the authorised broadcasting organisations in the Netherlands and contrary to the Broadcasting Act" (1).

The two criteria of prohibition in this passage are defined as follows:

- "Programmes (broadcast) contrary to the Broadcasting Act"

  These are programmes with wholly or partly commercial aims that have no place in the current Dutch broadcasting system, which is exclusively for broadcasting organisation that represent a social, cultural or religious or philosophical section of the population and meet, by broadcasting programmes of public interest, the cultural or religious/philosophical needs of the population.

- "Programmes intended for Dutch audiences"

  These are programmes in Dutch which deal firstly with events of direct interest to the population of the Netherlands and secondly advertise products and services on sale only in the Netherlands.

Towards a convention on trans-national broadcasting

Although the Dutch Government can be intransigent about cable in order to protect the national media system from the risk of commercialisation, the restrictions it has listed will not be enforceable when the era of direct satellites arrives. It is well aware of this: it claims that it is at present encouraging bi- and multi-lateral agreements on direct broadcasting by satellite in view of its fundamentally favourable attitude to the free flow of information.

In this respect its wishes are echoed by other governments, eg the government of the Federal Republic of Germany which in its Declaration on the Media of 24 June 1981 came out in favour of a European broadcasting convention so that the weakening of national media structures could be prevented.

These declarations naturally echo some of the wishes expressed by the Parliamentary Assembly of the Council of Europe in 1981 and the European Parliament in March 1982 which are at present being considered by the Steering Committee on the Mass Media (2) and the European Commission.

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(1) "Dutch Broadcasting Policy and Satellites", a memorandum presented by the representative of the Dutch Government to the Steering Committee on the Mass Media of the Council of Europe, Strasbourg, 1 October 1981, p 2.

(2) In particular its Committee of Experts on media policy

Many observers feel that such European efforts at harmonisation can be effective only if at the same time practical co-operation is established. An example of such co-operation is that comtemplated by several countries on the initiative of France, ie a "European audio-visual space" based on the TDF-1 satellite.

B. The press and the electronic media: multi-dimensional publishing

Relations between the press and radio and television in Europe are characterised by an almost primitive intimacy. The reasons for this are many and complex: natural competition between printed matter and the audio-visual media, both at an editorial and economic level; the contempt of newspapers as private concerns for the public monopoly of the waves (1); the disappointment of the press's hopes that it too would have access to these waves (2); increased competition with the extension of advertising to television and radio ....

Many surveys have been made over the years on the economic circumstances of the coexistence of radio and television and the press; the German Parliament found in 1966 that there were no competition imbalances in order to show that the printed press was in a healthy state vis-à-vis electronics. Although these conclusions were disputed, they were also regularly confirmed not only in Germany but also in other countries. A recent report by a committee of Swiss experts stated that there is total complimentarity between these two media, as the world circulation of the press has constantly increased alongside the increase in the number of radio and television programmes.

In fact the figures are ambiguous. Whereas the press has developed positively (3) - in Switzerland and Germany, and moreover in Europe - in terms of circulation, this development has been accompanied by an appreciable reduction in the number of independent firms. This phenomenon is well known, and the tendency towards CONCENTRATION is now one of the basic features of the press sector; it takes concrete form in many ways:

In the daily press, the number of newspapers has dropped both at national, regional and local levels. Three or four newspapers at most survive at national level, and the regions are dominated by monopolies. A large number of firms and editorial offices disappeared but so has the pluralist expression of opinion: in many countries, the majority of the daily newspaper press is conservative.

This is why in Sweden for example it has been decided to set up local public radio stations, whose internal pluralism should compensate for the one-sided nature of the printed press (4).

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(1) Although in most countries, the press has finally accepted public subsidies.

(2) Only in the United Kingdom has the press been allowed to take part directly in (commercial) radio and television.

(3) Cf Symposium of the International Federation of Newspaper Publishers, Geneva, 22-23 Oct. 1981. Moreover the same trend is appearing in the United States, despite the explosion of the audio-visual media in the last few years: circulation of daily newspapers has risen from 58.8 to 62.6 million copies between 1960 and 1980.

(4) Monica Boethius, Regionaler Hörfunk in Schweden, in Media Perspektiven, Frankfurt, No. 1, Oct. 1977.

While the daily press has become specialised GEOGRAPHICALLY in that it has found its principal audience in the regions, the magazine press has become specialised SOCIOLOGICALLY in the sense of audiences being defined by age, profession, collective tastes and interests. Thus the number of publications has multiplied greatly, backed by eager advertising of specific target publics (advertising which cannot be invested on radio and television).

However beneath the apparent proliferation of publications, there is a limited number of publishing firms. The branches of these firms go well beyond national frontiers: scale must be achieved by means of trans-national distribution to make publications for SPECIFIC publics profitable.

This is broadly the general situation of the press in Europe at a time when it is faced with the initial manifestations of the second wave of audio-visual media:

- relative prosperity (subject to exceptions) threatened by the general economic situation;
- a delicately balanced situation viz à viz radio and television (balance sometimes ensured by agreements concerning the limitation or absence of advertising on the air);
- an important development of the regional daily press, often guaranteed by a position of monopoly;
- a broad diversification of the specialised periodical press;
- finally, a strong trend towards the concentration of firms, both within and beyond national frontiers.

In fact, for several years already the press has been expecting the arrival of new audio-visual systems, that might bring access to television screens, and so revenge on the public monopolies in the field of images, but also new competition ...

However it has taken approximately 10 years for the new media to become a somewhat tangible reality. Now as before, the attitudes of the publishing world are determined by two factors: the audio-visual media's threats to the printed word and the development possibilities it offers.

1. There are three kinds of threats:

The first concerns the ZONE OF ACTIVITY to date reserved to the different types of press: the regional and local zone, the priority zone of the daily press, will be affected by the vast decentralisation movement in the audio-visual media. The TARGET PUBLIC "slots" occupied by the magazine press will be affected by specialised video production and certain forms of pay television.

The second threat deals with different types of press RESOURCES, particularly ADVERTISING. In this respect the balance between radio and television and the printed word is delicate: a single even very small transfer seems capable of having a very adverse effect on newspapers, which on average rely on advertising for 50% of their resources, especially as the advertising market is experiencing a recession which may get worse (1).

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(1) As regards magazines for example, approximately 10% in a country as keen on advertising as Germany (cf Rundv Mediendienst, 7 October 1981, Axel-Springer-Rede: "Telemedien für die Presse", p. 6).

The regional press above all fears that the audio-visual media will invade its hitherto exclusive territory.

In France it has been calculated that an advertising loss of only 10% might threaten the existence of that press (1). The same would apply to the resources that the press gets from USEFUL INFORMATION: classified advertisements, entertainment schedules, sports results, daily events, etc which is an important sales factor. The press is concerned here about telematic experiments aimed at the general public whose initial successes have been based precisely on so-called "functional" information.

The third threat concerns the inherent content of the press: its EDITORIAL CONTENT. Any form of audio-visual competition can affect that content: competition from telematics can affect news in daily newspapers, new competition from "video-journalismè (cf video magazines) can affect magazine reporting and competition from free radio can affect the regional press ... Most observers agree however that the press will continue to exist, provided it develops a new quality in its news, commentary, research and analysis that is resolutely adapted to demanding audiences ("high-powered" in advertising jargon) (2).

Newspapers fear another phenonemon in this context: the takeover of the press by firms that are outside the communication world or whose business centres are non journalistic. This tendency, already common in the United States, is beginning to develop in Europe. Newspaper firms, commercialised as a mere ECONOMIC SUB-PRODUCT, are in danger of being marginalised within large conglomerates in which they are judged exclusively in terms of their financial profitability. This "functional" alienation will not only have serious consequences for the freedom of expression but is scarcely reassuring as regards the defence of the press's particular role in the face of the rise of audio-visual media.

2. Although the audio-visual media appear as a threat, on the other hand they offer new horizons to the press, DIVERSIFICATION is now the magic word: taking part in the audio-visual media in order to compensate for market losses and to win new markets. As was stated at the 9th Congress of the International Federation of Newspaper Publishers in October 1981 in Geneva, whatever means are used tomorrow to disseminate information, it will be up to the press to take part in them and master them; for that purpose, it must prepare itself now for this change and not allow others ... to take control of the market (3).

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(1) Cf "La presse régionale devant le rapport Moinot", "Echo de la Presse et de la Publicité", Paris, 2 November 1981, p.21.

(2) cf Colloquy "Futur de la presse", EPP, 23 November 1981, p 11 - "Media Science News Letter", September 16-30 1981 - "The media decade" in NEXT, no. 1, part "Newspapers face troubles, but they'll still be a good deal".

(3) "Demain, la Presse", "Echo de la Presse et de la publicité". 2 Nov 1981, p. 14.

There are several kinds of diversification movements:

- press and book publishers are setting up branches and subsidiaries in different areas of the audio-visual media, often in co-operation with other specialised companies (cf BERTELSMANN in Germany, ESSELTE-BONNIER in Scandinavia etc).

- professional groups are collectively trying to carry out certain experiments: organisations of publishers (cf Germany) or trade union groups (cf France).

- other communication firms wishing to take advantage of the technology and of publishers' know how; (cf interests acquired in publishing by the Ets GAUMONT, the French cinema group) (1).

- electronic hardware constructors and managers are trying to combine hardware and software in order to gain maximum control of communication markets; (cf MATRA-Hachette) (2).

Decentralisation of the audio-visual media

In several countries the most immediate problem for the DAILY press is the decentralisation of the audio-visual media.

In FRANCE for example, the plan to carry out a vast regionalisation of public radio and television is regarded by newspapers as contrary to their vital interests (3), and as the greatest threat against the very existence of the regional press. This plan in fact involves not only more new stations but a considerable increase in advertising on public wave lengths.

The union of Daily Newspaper Trade Unions estimates that 25% of the revenue from commercial advertising (ie approximately 550 million FF) will be taken away from newspapers in this way, thereby destabilising half of provincial press concerns (which taken together employ approximately 20,000 persons). The Union is demanding a round table conference on the state of communications professions in order to examine the overall economic situation of the media, while at the same time taking account of cultural and social implications (4).

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(1) Gaumont is connected to the Luxembourg Broadcasting Company (11.5% of Gaumont's shares), and via Marcel DASSAULT (10%) with the radio station EUROPE No 1. Moreover, there is also an agreement associating it with the American audio-visual giant RCA).

(2) Communication and construction activities have however been somewhat separated since the nationalisation of MATRA, the former's activities remaining subject to private regulations within the new "MMB" company.

(3) cf Maurice BUJON, President of the Fédération Nationale de la Presse Francaise, in "Echo de la Presse et de la Publicité", 2 Nov. 1981, p. 22.

(4) Statement by the Union des Syndicats de la Presse Quotidienne Régionale concerning the division of advertising revenue, April 1982.
NB. The idea of the round table conference was accepted in principle in May 1982 by the Prime Minister, Mr Mauroy.

Newspapers are demanding the right to take part in the use of the waves in order to guarantee their interests. If they are not granted this right, the press might regard itself as being in a situation of SELF DEFENCE (1) and broadcast over the air regardless of the risks involved. Tens of thousands of workers in the written press would not in fact understand that their firms were being allowed to collapse and that nothing was being done ... (2).

Many newspapers have already joined private local radio stations, but their range is limited by law and by the no advertising rule. This prohibition is based at least partly on certain press requirements. The new government, declared the Minister of Communication Georges Fillioud in June 1981 (3), will not allow the establishment of commercial stations which will inevitably be controlled by major newspapers, powerful advertising agencies or large industrial groups ,..

This statement undoubtedly refers to ITALY, where the major publishers have assumed control of private radio and television stations (which are no longer referred to as "free" and have ceased to be local ...).

The most powerful publishing house is undoubtedly SILVIO BERLUSCONI. The media is only one means of diversification among others for this enormous multi-functional conglomerate of more than 100 firms. Berlusconi controls the richest Italian television network (CANALE 5), the purchasing/distribution company RETEITALIA, whose London and New York offices buy the successes of the English-speaking box office at the full price, the microwave relay installation company VIDEOTECHNICA, the advertising company PUBLITALIA and ELECTRONICA INDUSTRIALE, which manages a network of retransmitters of foreign stations. This perfectly integrated structure - including purchase, production, distribution, advertising and technical infrastructure - is the Italian incarnation of the American concept of NETWORK.

Angelo RITZOLI owns the largest publishing empire, including notably IL CORRIERE DELLA SERA. He owns a television company PRIMA RETE INDEPENDENTE/PIN, the production companies CINELANDIA and RIZZOLI FILM and the distribution company CINERIZ. He owns most of the service network COMPAGNIA TELEVISIONE ASSOCIATE/CTA, including about 20 stations most of which are connected with national and regional daily newspapers (4).

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(1) Francois BOILEAU, General Manager of L'EST REPUBLICAIN (Nancy) cf, EPP, 22 November 1981, p 21.

(2) Claud PUHL, President of the Syndicat National de la Presse Quotidienne Régionale (SNPQR), in "Echo de la Presse et de la Publicité", 28 Sept.1981, p.8.

(3) At the Annual Congress of the Syndicat National de la Presse Hebdomodaire Régionale d'information, in Bordeaux, cf EPP 22 June 1981, p 1.

(4) With a central editorial section in Rome, Rizzoli tried to broadcast the first televised NATIONAL news programme, "Contatto". The intervention of the constitutional court should check - at least temporarily - the national plans of private networks as regards live news.

The publishers EDILIO and ALBERTO RUSCONI own the most popular TV stations in Italy, situated in Milan and Rome. They set up RUSCONE EDITORE ASSOCIATE/REA, a programme purchasing and distribution company (which has acquired 300 Paramount films) and has concluded an advertising agreement with PUBLIKOMPASS, a branch of FIAT ...

Three other publishing groups - MONDADORI, PEDRONE and CARACCIOLO - jointly set up a new national network at the beginning of 1982 covering all of Italy: "RETE 4" will now be first of many private stations. Supplied by the major distribution companies owned by each of the three partners, it will offer one of the most attractive schedules (based on the Paramount and NCA catalogue) ...

Publishers television - a dream cherished for the past 20 years in Germany - now exists in Italy.

"Satellite-to-Cable" publishing

According to certain sources the increase in the number of private radio and television stations has led to a 50% reduction in the sales of Italian weeklies. If this is true, there is no doubt that publishers have adequately made up for these losses through their activities in the audio-visual media - in any case the major ones have.

On the basis that inevitable losses must be compensated for, - especially in terms of EMPLOYMENT - GERMAN publishers are insisting on having access to the first major cable networks, and even the satellites.

In 1976, the commission for the development of technical communication systems/KTK (1) recommended four pilot cable experiments so that the public's acceptance of new communications services could be ascertained in practice.

To carry out these four experiments, regional authorities are preparing the technical and cultural management structure in a very controversial climate (2). In Rhineland-Palatinate, the first Cable Act was passed in 1980, providing for the participation of "private organisers", including press concerns. In Munich the Bavarian Government has just authorised the setting up of a technical management company, also mixed, in which the participants will include public radio and television, industry, trade, the press and audio-visual production companies. Other regions are hesitating; committees of experts are considering the matter and the financing of projects is creating a problem.

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(1) Kommission für den Ausbau des technischen Kommunkationssystem.

(2) Caused inter alia by citizens groups such as "AG Kabel kommunikation" in Berlin, "STOP Kabelfernsehen" in Dortmund, "Arbeitsgruppe gegen Kabelfernsehen" in Munich, "Arbeitskreis gegen Kabelfernsehen" at Mannhein-Ludwigshafen ...

In Ludwigshafen (Rhineland-Palatinate), the press hopes that by experimenting several possibilities, it will set an example by its participation. In addition to the local newspaper, the Association of Daily Newspaper Publishers would be represented on the "New Media" company which was set up to guarantee press interests in the audio-visual media. With a budget of 12 million DM for this project, "New Media" has requested a license from the regional government with the intention of providing a daily programme of between $1\frac{1}{2}$ and $2\frac{1}{2}$ hours, including both news and entertainment programmes (the statutory rules governing the Ludwigshafen network provide that 20% of the programmes may be devoted to commercial advertising. Financed proportionately by publishers in accordance with the circulation of their newspapers, this budget will cover a two year period, giving employment to about 50 people.

Daily newspaper publishers are BY AND LARGE taking part in this specific experiment both as a political gesture and to set an example: the gesture is a practical manifestation of their entry into the audio-visual media (1) and the example will illustrate the quality of their products with larger projects in mind. However, in addition to this collective experience, each newspaper is separately interested in cable for the purposes of more regional experiments: the daily press in Germany as elsewhere is substantially decentralised, and there is a strong monopolistic tendency in each region. Participation in cable represents thus for each paper a means of maintaining if not strengthening its present position.

Cable leads to satellite and vice versa. Therefore the German Association of Daily Newspaper Publishers had combined with the CLT/RTL to take part in the future trans-national NETWORK which would have been set up with the help of the future Luxembourg satellite.

CLT has in fact announced the setting up of a European television company, 49% of whose shares will be offered to partners in different countries, and particularly to the press. In spring 1981, German publishers unanimously accepted direct minority participation. Since then however it seems that the publishers' unity has been somewhat eroded not only on account of discussions between press groups but also uncertainty about the profitability of the undertaking (2).

Cable and satellite are also matters that concern the DUTCH press, increasingly irritated by the growing number of pirate television stations and displeased at the thought of foreign commercial programmes coming into the country. In a letter to the government, the Association of Newspaper Owners/ANDP urged the authorities to take the measures required to protect the written press from the electronic media without delay: ie the negotiation of international agreements to avoid commercial programmes being transmitted by satellite (!), strict regulations governing cable telematics and a reduction in television advertising (3).

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(1) As broadcasters and programmers (some large publishing houses already act as producers of programmes for broadcast television.

(2) Recently, the publishers decided not to take part in the project.

(3) A substantial increase in the overall transmitting time and in advertising time is scheduled for Dutch television with the prospect of competition from foreign commercial programmes.

Failing effective political action, the press has threatened to go on the offensive by taking initiatives of its own in radio and television: it could inter alia - it claims - accept the invitation of the Luxembourg broadcasting company to take part in the future RTL satellite ...

Telematic publishing

Of all the new systems, telematics has provoked the most interest in the press: like newspapers, it is a "text media" (1). For this reason, newspapers challenged the right of television companies to broadcast written news ... Whether news is printed on paper or transmitted electronically on a television screen - claimed publishers - it belonged to the exclusive sphere of the press.

In most countries, the International Telecommunication Union/ITU's definition of television broadcasting as the direct broadcasting to the public in general ... of sound and visual signals of any kind - and including therefore sui generis, the transmission of printed texts (an interpretation which continues to be a matter of controversy in Germany), has been used as a reference.

Because it does not have natural authority in this field, the press has in many countries asked not to be excluded from the TELETEXT systems which broadcasting bodies were setting up. This request has been dealt with in various ways:

One possibility is to use the National Press Agency, generally an instrument that is common to both the written and televised press. In Belgium for example, publishers' associations take part in RTBF's PERCEVAL system (2) through the agency BELGA, which is responsible for news and the press review in that system.

A similar practice was adopted in Austria where publishers used the AUSTRIA PRESS AGENTUR/APA agency to produce the news pages in OSTERREICHISCHER RUNDFUNK/ORF's teletext. However, after a year and a half, the publishers decided to discontinue their co-operation, stating that they were unable to obtain more direct newspaper participation in terms of a greater number and higher standard of news pages.

The press is represented in Germany VIDEOTEX by five supra-regional daily newspapers, entitled to about 15 pages for the purposes of a daily review of their headlines (3).

It is undoubtedly in France that newspapers have the most promising prospects as they may use TELETEXT on an INDIVIDUAL basis. To date, four daily newspapers have been granted permission to test the ANTIOPE system (4). These are regional newspapers whose electronic magazine programmes are broadcast on the transmitters of the "FRANCE REGIONS" television channel, but on closed circuit.

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(1) A commonly used expression in Germany.

(2) Radio-Télévision Belge de la Communauté culturelle francaise.

(3) Frankfurter Allgemein Zeitung, Süddeutsche Zeitung, Die Welt, Frankfurter Rundschau, Das Handelsblatt.

(4) Le Republicain lorrain, Nice Matin, Les Dernieres Nouvelles d'Alsace, l'Est Republicain (as an exception to TELEDIFFUSION DE FRANCE's monopoly).

However, experience to date has shown that most existing teletext systems are of little interest to the press: they are neither a danger nor an advantage ... Having a small informational capacity, they are still only a POTENTIALITY. The participation of the press reflects above all its desire to make its presence felt in the political sense and to restrain initiatives by radio and television in fields that are particularly exposed to competition: news, cultural affairs, stock exchange prices ...

The first surveys of public opinion show that teletext as a technological innovation is only slowly becoming known: only a small section of the public knows about it and only a small percentage of viewers uses it. This undoubtedly is only partly attributable to the slow development of the decoder market.

It must be said that this media's supply is limited to a certain threshold, owing to the restricted space available to it on the hertzian network (at the moment, technological developments allow only a few line spaces to be used for teletext transmitted at the same time as programmes).

It seems that teletext is competing especially with RADIO, as users turn to the latter principally for concise up to the minute news. In any case this is what has been found in Germany, the Netherlands and Austria. INTERACTIVE VIDEOTEXT and even CABLETEXT will one day be a much more attractive media for the press as they will have an almost unlimited information potential and can offer the press very extensive possibilities for taking part both on an individual and group basis.

The disadvantage of the system is its cost, judging from the rates charged to date: rates for access to the networks, for insertion and data update terminals and for data-processing assistance to inexperienced publishers (coding, data management etc). It is probably however that the technical costs will decrease as the systems come into general use.

In several countries, book publishers and periodical and daily press publishers took advantage at once of the possibility of taking part in the first experiments. Accordingly, one of the best represented economic sectors in PRESTEL in the United Kingdom is the publishing sector (1): it includes a large number of regional daily newspapers and magazines such as the ECONOMIST - which regards itself as "one of the leaders" among the 400 information suppliers that fed the system in 1981 (2).

"Umbrella" organisations are generally formed by those receiving the services of an interactive video system in order to guarantee the collective interests of certain professional groups, possibly by means of specialised service companies. This structure was adopted by the press in the Netherlands, where in the VIDITEL system owned by the telecommunication authorities, newspapers set up the KRANTEL service to organise their adaptation to telematics by means of an economic interest group.

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(1) NB. Situation before the pooling of databank service centres.

(2) Advertisement in the Economist of 22 August 1981.

In France, there is a slightly different arrangement in the TELETEL system: the four trade unions that make up the entire daily newspaper press has set up a structure that jointly produces the "Journal Electronique Francais", the JEF. "The experiment consists in learning the techniques and know-how of an electronic newspaper and public reaction to the different columns we offer it" (1).

The press was however very suspicious of interactive videotex: it suspected the PTT of telematic imperialism that threatened to flatten it under the steamroller of industrial policy. Only after it had been assured of permanent consultation - particularly within the Governmental Commission on Press and Telematics - did it begin to take an active interest in TELETEL, either on an individual basis (cf Le Parisien libéré) or through professional groups. Its anxieties have not however been calmed, far from it. In France as elsewhere, fundamental problems remain unsolved concerning telematic publishing, a new loosely defined concept with uncertain professional and legal implications. For this reason the Union of Regional Daily Newspaper Trade Unions/USPQR published a white paper in October 1981 outlining a number of urgent demands - which serve as a model in other countries (2):

- rapid introduction of regulations governing telematics and the general public (TELETEL and ANTIOPE), and in particular determining the status of the publisher - manager of the electronic publication; establishing the status of a "server" and a "carrier" by analogy with the status of a printer.

- assistance to the press so that regional and inter-regional databanks may be set up; a ban on commercial advertising, and classified advertisements to be exclusively reserved to the press.

Moreover, in respect of the problem of advertising and classified advertisements, the French press is worried about the increasingly general use of the ELECTRONIC TELEPHONE DIRECTORY (cf p 9): like the paper directory, it contains a business section which the telephone authorities might be tempted to develop in order to make household terminals profitable. This directory might one day become the most important free newspaper, depriving the written press of part of its vital resources (3). However, although the press in Europe is going through a certain malaise in the face of telematics, the threat of potential competition is not the only explanation. For the first time, newspapers - private enterprises whose products are freely DISTRIBUTED - are preparing to take part in LONG DISTANCE TRANSMISSION NETWORKS, ie PUBLIC networks that operate for a specific purpose and in accordance with specific regulations. The change in the system is not only technical but has political or even "psychological" implications: will freedom and responsibility be the same as they are outside the networks?

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(1) "JEF, le Journal Electronique français" SONOVISION, January 1982 pp 66-67.

(2) Télématique et Presse Régionale, Union des Syndicats de la Presse Quotidienne Régionale, Paris, October 1981, p. 11.

(3) Rapport BUJON in "Echo de la Presse et de la Publicité", 25 May 1981.

B. Cinema and electronic media: Hollywood rules the world

1. For a long time, cinema and television have had a strange love-hate relationship, the proportion of one to the other varying according to the period and the circumstances.

It is known that in Europe, television has contributed to a considerable reduction in the cinema-going public (1). The following is all that remains of the original pre-television public:

France	41%	
FRG	17%	
Japan	14%	
UK	12%	(2)

However, television has at the same time had an unprecedented effect on the cinema as the latter has become the former's principal source of supply. ("The section of the cinema known as television"; Jean-Luc Goddard). Thus in France each year some 4,200 million viewers watch films shown on television, as opposed to 170 million in cinemas (3).

This is undoubtedly a positive factor for the development of the cinema in the cultural sense but economically disastrous.

The competition provided by television to the cinema by means of the cinema is hardly compensated by appropriate payment: the latter represents at most 10% of the production costs because it is regarded - wrongly without a doubt - as being of residual value after films have been shown in cinemas. Thus not only cinema owners and distributors but especially those entitled to production rights are put at a disadvantage. However, "if past productions are not paid for, there will be no future production ..." (4).

This "lazy use" (5) of the cinema by television has led the two media into a vicious circle. Being the public's favourite product, and inexpensive, films are widely shown on television. The crisis has led it to grant concessions relating to broadcasting waiting periods and screening times and days. Some television stations end up being merely electronic film distribution systems, as a substantial number of the private Italian channels are (6).

However, the cinema, television's basic product, occupies the prime viewing hours and considerably limits the space and possibilities for promoting original television productions ...

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(1) It is well known that the majority of the cinema-going public is now in the 15-35 age group and its socio -cultural level is relatively higher than average.

(2) Figures mentioned by N. SEYDOUX, Chairman of the French Working Party on "Cinéma et les nouvelles techniques de l'audiovisuel" at the Annual Conference of the International Institute of Communications, 7-10 Sept 1981, Strasbourg.

(3) According to the "Cinéma et Techniques nouvelles de l'audiovisuel" report published in Le Film français, No. 130, 31 October 1980.

(4) Nicholas SEYDOUX, Ibidem.

(5) "Pour une réforme de l'audiovisuel". Report to the Prime Minister by the Commission for reform and re-orientation, presided by Pierre MOINOT, September 1981.

(6) "Le Cinéma face à l'Etat en Europe", cf LE MONDE, 5 October 1981. According to Carlo Lizzani, Director of the Biennial Venice Festival, the Italian cinema has lost one cinema-goer in two since the advent of pirate television.

To escape from this circle, an active co-operation policy between the cinema and television has been adopted in most European countries, particularly by means of the co-production of film which the Germans refer to as "amphibian", ie intended to be shown both in cinemas and on television. Forty films of this kind are made per year in France out of a total of 140. In Germany, more than half of the cinema industry's turnover comes from co-productions and television orders (1). In both countries, television also contributes to a cinema production assistance fund. The two media in Great Britain and Scandinavia co-operate in similar ways.

Although solidarity is a recent discovery in Europe, the film industry in the United States understood at a very early stage what television involved and without delaying, went about investing in the newcomer, thereby reversing the balance of power: American television today seems to be partly an extension of the film industry: more than half of the evening entertainment programmes (films, variety shows, games) are produced by the major Hollywood companies, and the networks are confined to news and sport (2).

Under the impetus of the MAJOR COMPANIES - Colombia, MGM, Paramount, 20th Century Fox, United Artists, Universal and Warner - the cinema has progressed well beyond the production of films, thereby enabling it, inter alia, to prepare for control of the new media. Two thirds of the programmes on the principal pay-TV networks are now made by the major film producers, and most of the video cassettes and video-discs on the American market carry made in Hollywood labels.

The industry has defined a clear objective for itself: to ensure that the collective consumption of films - ie in cinemas - becomes DOMESTIC, and even INDIVIDUAL consumption in the form of cassettes, discs and pay-TV.

According to American predictions, the future of the collective viewing market is not very bright: when presented with a choice, the public prefers any other form of film distribution to cinemas. "Cinema in the traditional sense has no future ... the HOME is where most people want to see their chosen film" (3). This scenario implies that the consumption of films will increase and that the "domestic" supply will substantially exceed that of television (4).

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(1) M.P. "PartnerschaftFilm/Fernsehen Bewährt", Media Perspektiven, Frankfurt 11/191.

(2) It must be noted, however, that CBS and ABC have their own film production subsidiaries.

(3) cf "Video boom in Europe", Kenelm Jenour, in the Hollywood Reporter, 6 October 1981.

(4) This possibility would, it seems, particularly as regards pay-TV, remunerate authors/producers more adequately than conventional televis[illegible]n does. The possibilities offered by cassette are in this respect less inviting because of the risks of pirating. Added to other disadvantages, these risks are so serious that the MEDIA SCIENCE NEWSLETTER has formally advised film companies not to rely on what it calls domestic archival media (cassettes and discs) in view of the limited revenue they yield to those entitled to performing rights. The review even describes the recording of an enormous number of films on cassette as a "kamikaze operation" (according to the review, the first ten cassette successes brought only an average of 250,000 dollars to those entitled to the performing rights). On the other hand, it strongly recommends the film industry to set up its own pay-TV channels (as Warner has done). MSN, October 1-15/1981. Vol. 3, issue 12, New York.

A film is no longer produced for cinemas and/or television exclusively. It immediately becomes part of the cable, cassette and disc potential: in this way, the diversity of markets will counterbalance the financial risks of production (a film for the general public in the United States requires an investment of about 100 million dollars ...). This is what can be appropriately called SEQUENTIAL use: firstly it is released in cinemas; 2-3 months later, it is distributed in the form of a cassette or disc, and then on pay-cable within 12 months; subsequently it is broadcast on hertzian television networks and possibly again on cable ("basic" or "pay") (1); finally it circulates in local stations affiliated to the major networks".

Sequential distribution increasingly involves diversified pre-buying, particularly by television stations and pay-cable companies. As the latter are extremely avid "cinema consumers" - 500 films scheduled for 1982 for Home Box Office/Time Inc's channel alone - it is in their interests to actively promote original productions: participation in the pre-buying process guarantees them either exclusive rights or priority cable rights.

2. Hollywood rules the world: this is also the case in Europe (2), the final stage of sequential distribution ...

The American cinema has already, through its powerful subsidiaries, grabbed a lion's share of the European cinema-going market: 33% of cinema attendances in France (almost double the 1979 figure), (3) 31% in Germany (4) and much more in small countries such as the Netherlands and Belgium ...

On the other hand, European cinema is insignificant on the American market (5). Generally, Hollywood has colonised the film industry throughout the world without any reciprocal influence (6).

It now appears, entirely logically, to be consolidating this COLONIAL EMPIRE with the help of the new media. "No matter how people eventually receive their audiovisual entertainment - by cable, broadcasting, satellite or otherwise - and no matter where they consume it in theater, living room, bars or on their wrists - the AMERICAN FILM INDUSTRY will most likely be the source of programming" (7).

This concise prediction is now materialising in Europe, thanks to the bridge heads that American showbiz has established in the cinemas in Europe, just as it has in records, books, the press, some commercial television stations. Europe is a very attractive target as it is still largely VIRGIN in terms of "videotechs" (8), and all the more vulnerable to the strategies of overseas conquerors because it is only just beginning to face up to them.

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(1) cf Fred M COHEN, ibidem, p. 11.

(2) "Hollywood rules the world", Newsweek, 28 September 1981, p. 50.

(3) Report by the group to reflect and make proposals regarding Cinema, chaired by J L BREDIN, submitted to the French Government on 3 Nov 1981.

(4) Cf "1980 Erfolgreiches Kinojahr" in Media Perspektiven, Frankfurt, No 7, 1981.

(5) Scarcely 1%, according to Jack LANG, French Minister of Culture, quoted in LE MATIN of 10 September 1981.

(6) Clare DOWNS, in Newsweek, ibid.

(7) "The Silver Screen under Glass", CHANNELS, Aug-Sept 1981, p. 32.

(8) A common abbreviation for all new electronic systems.

Video cassettes and discs seem to offer the best medium-term outlet for an American cinema in search of home markets (ie individual consumption). Cable networks - particularly pay-TV - are limited and satellites are still far away ... the salesmen of the American audio-vidual media believe that Europe is suffering from what they call a shortage of images - a shortage that is extremely favourable to their interests ...

The six MAJOR companies alone have more than 6,000 films to pour onto the European market, not including recent and future productions. There are many distribution channels:

- Firstly they operate through the subsidiaries already established in the cinema and record industry, whose distribution structures dominate the video market. (Eg monopoly of WEA, Warner Communication's Distribution Company);

- They are extended by agreements with European companies, preferably multi-media companies (Warner have an agreement in France with Filipacchi/Hachette);

- Further distribution channels are set up by international companies formed for that purpose (CBS Video International, VIACOM International ...).

As regards PAY-TV, only one series of experiments of any importance has been authorised in Europe, namely in the United Kingdom, (except for individual experiments in Switzerland and in Finland) (cf p.11).

These experiments (provisionally limited to two years) are subject to rules laid down by the Home Office:

- Films scheduled for pay-TV must have the prior approval of the British Board of Film Censors (a self-governing body), and may not be broadcast until 12 months after they have been registered for public showing in the United Kingdom (the films may not be shown on television until three years later, subject to exceptions). No "X" film (prohibited for those under 18 years of age) may be shown before 22 h. The usual quotas concerning the national origin of the films must be complied with on cable.

- Exclusive cable transmission rights may not be agreed to for sporting events or national entertainment programmes.

- Advertising is prohibited.

- Companies must submit their schedule of programmes to the Home Office and are obliged to carry out research at the same time on public reaction.

These experiments must undoubtedly be considered in the light of the announcement of the setting up of a British direct broadcasting satellite for which the BBC has been granted a licence to prepare a pay television service (cf p 4). This announcement has given rise to very heated reactions in the cinema: under the official plan, films will be shown on pay-TV only a few weeks after they have been released in cinemas.

According to the Association of Film Distributors/CEA, this plan would be a disaster for the film industry and it is demanding that the current three-year waiting period be maintained. It claims that there are no reasons why special advantages should be given to satellite television.

3. Thus, programme quotas fixing the proportion of films of English and even European origin, to American films apply to British pay-TV.

The practice of using quotas, in Britain as in several countries, is part of a policy to defend European cinema from the American "gulfstream". The state of the cinema is worrying not only those engaged professionally in the industry but also governments who have provided public funds for assistance and promotion.

It seems that in France, the cinema has had most success in retaining its vitality by means of more intensive national production than elsewhere and a larger cinema-going public. As France regards itself as "the second film-producing country in the world" (1), it intends to act - according to the present Minister of Culture - as a protector against American standardisation. With this in mind, the French Government has contacted its German neighbour to examine the joint financing of a number of productions as part of an active film co-operation policy. "What is the use of continuously chanting an operatic aria: Europe, Europe, Europe ... if European states do not work together and decide instead to establish relations with the multi-nationals rather than among themselves ..." (2).

The declarations made by the Minister - who acted on his statements in favour of the cinema by trebling the financial assistance to film production - were preceded by work carried out by several official committees or study groups responsible for examining the future of this media (3). This work did not really take account of the new audio-visual systems and their effects on the 7th art (4): these systems seemed still on the very distant horizon (1985-90). The conclusions of the various reports emphasised the strengthening of the cinema in general by means of:

- better relations with television: less broadcasting of films, but proportionately more of French and even European films; better payment for television showings; further co-operation;
- re-arrangement of distribution (tends to be oligopolistic) and screening (not decentralised enough) structures; the promotion of film production and joint action by European countries.

As a follow-up to these proposals, the first practical measures have just been presented by the government in a draft reform of the French cinema.

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(1) cf Jack Lang, in "LE MATIN", 10 September 1981.
NB: This undoubtedly refers to the western world: it is often not realised that some non-western countries such as India, have an extensive film industry.

(2) Ibidem.

(3) Commission "Cinéma et les nouvelles techniques de l'audiovisuel", presided by N SEYDOUX; Group to reflect and make proposals regarding Cinema, presided by J L BREDIN; "Pour une réforme de l'audiovisuel", Report to the Prime Minister by the Commission for reflection and re-orientation, presided by Pierre MOINOT.

(4) Although the SEYDOUX group has worked specifically on this subject, it has remained very quiet on how the cinema could positively deal with the new systems.

It is certainly important to strengthen the cinema as a whole so that it can face the future. This future, however, is already taking shape at many levels, particularly with the prospect of new technical systems. It would be dangerous to disregard these systems on the pretext that they are only germinating. Is there not a danger for example of completing an elaborate infrastructure for the collective viewing market at the very time when the latter is beginning to fall considerably?

Commercial agreements are in any case being prepared in what is a continuous transatlantic coming and going of video, cable and satellite dealers ... the large conglomerates of the European culture industry are in fact trying to match their north American counterparts while at the same time co-operating with them. In France, Germany and the United Kingdom, large groups are diversifying in order to take part in the first European "communication systems", linked to the United States in many ways ...

III. INTEGRATIONIST TENDENCIES

1. TECHNICAL INTEGRATION

Ultimately, all the media - at least some of their services - will be required to be connected to a network. From being synergetic associations, they will in fact become SYMBIOSES in two stages:

the interconnection of networks offering a limited number of services (provided that these networks are technically compatible);

the integration of a large number of services in high capacity single networks.

These networks of the future, based on opto-electronic technology, have already reached the trial stage in several European countries, particularly France and Germany (cf p 17).

2. ECONOMIC INTEGRATION

We are still a long way from the final stage of TECHNOLOGICAL SYNTHESIS of the media and their functions, and we are certainly a long way from the general operation of these networks.

In the meantime, the convergence of the systems is taking other no less disturbing forms that have an immediate repercussion on all communication systems in our countries. These are forms of ECONOMIC and even politico-economic INTEGRATION, in most cases based on a strictly commercial rationale. In different ways they all tend to follow the now dominant "model" of the CONCENTRATION of financial and management structures. This is a two-sided model: MULTI-MEDIA or VERTICAL concentration, integrating the greatest number of communication systems; TRANSNATIONAL or HORIZONTAL concentration, which brings the media of several countries under the control of a single conglomerate. Both types of concentration are usually cumulative ...

There is an extraordinary paradox here, because, whereas the new media were supposed to lead to an extensive diversification of the contents and structures of communication, they have been taken over by existing systems and swallowed up by traditional processes. Technical diversification and economic concentration: these initially paradoxical terms have come to complement each other closely through the "natural laws" of the market ...

This phenomenon is of course especially noticeable in the United States and has increased since deregulation was introduced as part of "Reaganomics" (1). Some refer to this as the American model - a model which existed before the new systems, because in the United States the press, radio and television and cinema are highly concentrated and even interconnected industries.

The new systems merely consolidate systems that are already widely established by giving them greater range; they make them more ostentatious and more striking to the European observer, who must be saying to himself that in a short time the repercussions will reach him at home: there are now many links across the Atlantic. They lead in particular to the few communication giants that have grown up in the last few years in the old continent itself. These do not indeed lack ambition in respect of the new systems.

On several occasions mention has been made in the previous chapters of concentration trends in the media, old and new. An attempt will now be made to present a more comprehensive and coherent outline.

BIG IS BEAUTIFUL: THE MULTINATIONAL MULTIMEDIA

The rationale is simple and well-known. Initially there is the dual phenomenon of anxiety and hope. Anxiety in the existing media about potential competition and loss of markets as a result of new technical systems and hope in extra opportunities that will make traditional activities and products profitable, thereby compensating for possible losses or better still gaining new markets. This leads to an internal diversification trend and, in turn, the establishment of subsidiaries. However, these subsidiaries are often formed by buying up specialised companies (or acquiring interests therein) in order to acquire their know-how and where appropriate, their technical or commercial infrastructure. To this network of subsidiaries must be added a series of agreements covering programmes, screening, distribution ... of such complexity as to link in certain fields companies that are competitors in others.

In addition to media amalgamations - embracing television, the cinema, video, the press, books, data communication, cable and satellite - the strategy of the leading communication groups is characterised by four major tendencies:

1. Integration, within the same subsidiary, of SOFTWARE (programmes) and HARDWARE (equipment) manufacture

This practice, which should lead to greater control of markets, is widespread in the United States and is beginning to be followed in Europe.

Some examples: the MATRA-HACHETTE group (2), the PHILIPS/SEMENS group and their subsidiary POLYGRAM (almost a hundred interests in about 30 countries); the THORN-EMI group (which has close connections with Japan's VICTOR COMPANY/JVC); the BERTELSMANN group (222 subsidiaries) which is connected to AGFA-GEVAERT, etc ...

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(1) The neo-liberal economic policy implemented by President Reagan.

(2) When MATRA was nationalised to the tune of 51% in 1981, the media sector remained privately owned through the investment company MULTI-MEDIAS BEAUJON/MMB.

2. The media controlled before and after PRODUCTION and at DISTRIBUTION STAGE

Distribution circuits in the cinema, video, musical publishing, and book publishing are substantially controlled by the major producers (PATHE, GAUMONT, HACHETTE ...), and particularly by transatlantic producers: for example in the Federal Republic of Germany, the three American giants - RCA, CBS and WARNER/SEA - control two-thirds of the record market. This domination is likely to extend to other fields.

3. Association with interests OUTSIDE the COMMUNICATION sector

Finance or para-financial companies sensing promising markets are increasingly interested in the audio-visual media. They regard the media as a consumer product amont others and therefore media management follows the same rules. Thus, for example COCA-COLA has bought the Hollywood giant COLUMBIA, WESTERN GULF has taken over PARAMOUNT, GETTY OIL is involved in cable satellite television and WARNER has combined with American Express.

In Italy, Silvio BERLUSCONI owned the finance company FININVEST before acquiring newspapers and many private television stations (and companies manufacturing transmission equipment). An already old example: the (Belgian) COMPAGNIE BRUXELLES-LAMBERT operating through two Luxembourg holding companies, AUDIFINA and FRATEL, is the majority shareholder in the Luxembourg Broadcasting Company/RTL. Other partners include notably the HAVAS Agency (set up by the French Government, which owns 51% of its shares), la COMPAGNIE DES COMPTEURS/SCHLUMBERGER, the PARIBAS bank and the HACHETTE Group.

4. Association with companies in the DATA-PROCESSING SECTOR

This is an important tendency because most media, at least as regards some of their activities, have to become computerised. Initially this tendency was especially apparent in the audio-visual media in America where it has already led to many companies being consolidated and bought up.

These movements are preparing the "INTERACTIVE FUTURE" of the audio-visual media:

- by the telematic formatting of contents of newspapers, magazines and books and even pre-existing data-banks;

- by using the videodisc with computer interface (cf the IBM/Philips association);

- by connecting home computers to the social communication channel (cf computers made by ATARI, a subsidiary of WARNER COMMUNICATIONS);

- by developing new means of long-distance promotion and sales (electronic and shopping sales), in co-operation with chains of department stores, insurance companies, banks, travel agencies ...

In general, the existing media, powerfully backed by extra-communication interest groups are helping themselves to the new media. Already tied to each other by numerous joint interests, the major consortiums have an unlimited number of branches and are now impregnable fortresses in the American culture industry. By 1990, there will scarcely be any independent firms left in the audio-visual media according to some observers (1). These enormous groups are creating veritable "RECYCLING subsidiaries" for audio-visual products that are adapted from the same source to the different media in accordance with the requirements of profitability. "No longer can a single technology be viewed in isolation. No longer can programming be made for a single delivery system. More than ever before a symbiotic relationship is developing between packagers, programme producers, feature film companies and the deliverer of ten cable and broadcast signals. What affects one segment of the industry causes a ripple throughout the whole entertainment complex" - Fred Cohen of TIME Inc. (2) (and he should know as a member of one of the biggest multi-media companies in the world, combining the press, books, hertzian radio and television, film production, pay-cable, video, telematics ...). James Monaco (3), the journalist and author takes a more lyrical view: "Today very few artists and writers work only in one precisely defined medium ... Film and television, radio and recordings, print and no-print, are all simply various facets of that one narrative art for which we still don't have a name. But, nameless, it pervades our lives. Our culture is whole".

A culture which threatens to become completely standardised and dominated by a few large structures ... represents not only a major concentration of economic and therefore political power but also conceals a formidable cultural supremacy. This power has already extended far beyond the American continent towards Europe and will impose its standards increasingly on what Jacques Thibau has called "l'audiovisuel euratlantique, produit de l'impérialisme culturel americain, homogeneisateur et commercial" (4), (the Euro-Atlantic audio-visual media, a product of the standardising and commercial cultural imperialism of America).

Europe is already well prepared to take part in the new "cosmosystems", thanks to the footholds gained in different countries a long time ago by American multi-nationals, and to the links established with national multi-media groups.

"Cultural imperialism", J Lorenzi and J Lefebure have remarked (5) "is not a modern phenomenon. However, it now has at its disposal particularly effective tools and substantial financial resources. Its influence on behaviour cannot possible be compared with the influence which purely material consumer products may have. Like the arms industry, the communication industry is economically destined to export. But unlike the manufacturers of military equipment, it can allow itself to export its best and worst products. Like all other manifestations of imperialism, it reflects not only the power of the dominant country, but also and especially the weakness or resignation of the countries under domination ...".

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(1) Cf "L'Industrie de la Communication aux Etats Unis", in LE MONDE DIPLOMATIQUE, Oct 1981, pp 7-11.

(2) COHEN, ibidem, (p. 11).

(3) CHANNELS, August, September, 1981 (p. 53).

(4) "L'Audiovisuel euratlantique" in LE MONDE, 4 January 1981.

(5) "L'Industrie de la Communication aux Etats Unis" in LE MONDE DIPLOMATIQUE Oct. 1981, p. 7.

THIRD PART - The Context

The different modes of interaction between the media, old and new, are part of a number of major trends which are determining the development of communication systems in Europe. An outline will be attempted here of these trends by summarising the previous chapters. Only when the interactions between the media have been placed in their general context do they acquire their full "political" meaning. Some practical observations can then be made.

The major trends in this field are centred on three axes where opposite and complementary developments converge. In fact there are three "pairs" of paradoxical tendencies that by virtue of a dialectical movement cannot be separated, each tendency relying on its opposite.

These antitheses are:

- firstly, the "LOCALISATION" and at the other end of the scale, the "INTERNATIONALISATION" of communication systems;
- then, the DIVERSIFICATION and its opposite, the CONCENTRATION of the media;
- finally, the progressive COMMERCIALISATION of systems and content and, as a reaction, the extension and increasing number of PUBLIC SERVICE initiatives.

I. LOCALISATION - INTERNATIONALISATION

The audio-visual media now resemble a Russian puppet; systems of all sizes fit in with each other, in different ways: international, national, regional, local systems.

REGIONAL AND LOCAL DECENTRALISATION appears to be the dominant characteristic of the development of the electronic media in Europe. Commenced by public radio and television (cf the BBC's local radio stations), it has grown well beyond the framework of existing bodies. In this way it has caused fundamental changes in the institutional structures of the audio-visual media. These structures, traditionally dominated by monopolies and even public oligopolies, are producing more and more "mixed" systems by juxtaposing conventional institutions with private and even commercial organisations (1).

Two observations should be made here:

- these mixed systems must be organised on the basis of COMPLEMENTARY initiatives. Complementarity must be guaranteed by rules governing service zones and tasks. In several countries experience has shown that in the absence of such rules much effort is expended on unsuccessful (and expensive) competition which ultimately has an adverse effect on the cultural and economic substance of the media.
- However, any regulations are in danger of being overtaken by the "de facto strategy" of planned illegality which exploits the divisions of those with political power and at the same time economic and industrial complicity, and is becoming important in the overall development of the audio-visual media. Much depends now on the political capacity of countries not only to establish such rules but to enforce them. Admittedly this capacity weakens as the composition of governments becomes complicated.

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(1) "Private" is not necessarily synonymous with commercial, as French and Belgian local radio stations illustrate.

The other media immediately affected by increased decentralisation is the PRESS. To a great extent regionalised, the press will come up against competition in an area it often dominates monopolistically. Dual competition: both in the advertising and editorial spheres.

- Careful account should be taken of the interests of the press in the debate on the decentralisation of the electronic media; it seems that in present economic circumstances there is a danger that the press will be DESTABILISED as a result of even limited revenue losses.

- On the other hand, it seems proper to try to counterbalance the regional monopoly of the written press - which is politically rather conservative - by setting up "pluralist" transmitters, whether the pluralism be internal or external (cf the situation in Sweden) (1).

- The same concern is responsible for the desire to counterbalance the restriction of "overlapping interests" in the ownership structures of regional and local transmitters. Italy is a good illustration of the face that the counterbalances the press wants in private radio and television can lead to a vast concentration movement, and a flagrant denial of the initial purpose of denationalising the waves.

There must be no self-deception; freedom of expression is often merely an alibi concealing much more selfish ambitions; local radio and television is only the beginning of a plan of world-wide conquest which, going beyond frontiers, merges into transnational policies aimed at breaking the existing systems by taking control of them.

In this way opposite developments are linked, as decentralisation converges towards the INTERNATIONALISATION of the media and communications structures. Opposites are in fact only superficial as the two tendencies can be totally complementary along the lines of AMERICAN NETWORKS; transnational and multinational systems will have regional and local media as relays - and vice versa.

Generally, the NETWORK could become one of the key concepts in the development of the media in Europe, not only at transnational but also at national level, as Italian networks and circuits have shown.

At European level, the appropriate instrument - the SATELLITE - is not yet available to establish this kind of "spider's web". However, certain CABLE developments, especially in Belgium and Canada, provide a foretaste of the multinational future of audio-visual communication.

- Clearly, these developments illustrate the considerable effect of transnational broadcasting: the challenge to (and even the denial of) the CULTURAL AND ECONOMIC SOVEREIGNTY of a country confronted with the principle of the FREEDOM OF COMMUNICATION.

Even if European authorities manage to reconcile these principles, eg in the form of a CONVENTION at institutional level, serious problems will remain in practice: the problem of preserving cultural identity, the stranglehold of competition which leads to the standardisation of programmes, ie an increasing number of facile entertainment programmes to the detriment of news (particularly SERIOUS news) ...

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(1) Internal or integrated pluralism: representing several ideological viewpoints in a station; external or "additional" pluralism: the co-existence of stations that each have a different orientation.

- Transnational and international agreements will therefore be meaningless unless they are complemented by PRACTICAL CO-OPERATION between countries and their media, that takes account of the VALUES PECULIAR to the different parties concerned, in an AUTHENTICALLY EUROPEAN framework.

EUROPE is in fact often only an ALIBI for plans to conquer enormous MARKETS, a conquest which is materialising with the help, particularly, of American audio-visual products (1).

Important movements are now taking place in Europe and the United States in the vield of VIDEO. These movements are in one direction only, towards the European market which is regarded as the priority target by American producers hoping to find a more favourable market than in their own country (which will soon be saturated with cable, satellite ... images).

Already nine-tenths of this (growing) market are controlled by American productions, most of which are made by the film industry. In a way, video is the ELECTRONIC EXTENSION OF THE AMERICAN COLONISATION OF THE EUROPEAN CINEMA ...

- In this field also only co-operation at European level aimed at original video production will adequately counterbalance this form of cultural occupation.

II. DIVERSIFICATION - CONCENTRATION

Closely connected to the problem of the internationalisation of communication systems is the problem of the opposition between the diversification and concentration of the media.

DIVERSIFICATION is an important trend in the development of the media, at least as regards technical relations.

The diversity of content has to date been limited. Existing content is to a great extent SUPERFLUOUS.

This is known as THE DIVERSITY OF THE SAME: cable relays television, video reproduces films, pay-TV lives off the cinema, telematics relays press agency news.

Redundancy will tend to become a business principle. And beneath the apparent variety of systems and services there will be a single basic pattern: the standardised consumer product, SEQUENTIALLY DISTRIBUTED by means of all the media, old and new - each representing a profitability factor in an overall marketing plan that is generally not limited to a national market but extends well beyond national boundaries ...

- It must be repeated that one of the major problems for the future of the media in Europe will be ORIGINAL PRODUCTION - the problem of resources, time, organisation ... This problem has already arisen today in television and in the cinema; tomorrow it will be exacerbated by the arrival of satellites and cable.

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(1) It is known that INTERCULTURAL FLOWS are already dominated by "Colombo" and "Dallas" (a series which has been sold in 86 countries ...)

If Europe wishes to retain and indeed assert its specific cultural characteristics in the face of the trans-continental standardisation of the audio-visual media, it must not hesitate to invest in production. It is clear that CO-OPERATION between the different countries will be the most effective kind of investment. (Co-operation has already to a great extent been started in radio and television organisations.)

Opposite tendencies converge here also: the diversification of the media is becoming a factor in the progressive CONCENTRATION of the culture industry. Throughout this industry, powerful conglomerates are forming and in a VERTICAL movement are integrating all the media, radio and television, cinema, video and sound publishing, cable, satellite, press and telematics and are controlling both production and the distribution of products; finally they extend HORIZONTALLY across the largest number of countries.

The result is multifunctional and multinational multi-media conglomerates. Their power is strengthened by capital from outside the communications world attracted by the emergence of promising markets.

- As regards printing, there are rules in several countries aimed at PREVENTING AN EXCESSIVE CONCENTRATION OF PRESS CONCERNS in order to guarantee pluralist expression.

  Perhaps it will now be necessary to extend rules of this kind to ALL COMMUNICATION CONCERNS, while adapting them specifically to the audio-visual media.

  (In this context, anti-trust measures have recently been taken by the CINEMA industry in France.)

III. <u>COMMERCIALISATION - DEVELOPMENT OF INITIATIVES IN THE PUBLIC INTEREST</u>

After the 50-year reign of public service broadcasting, there are significant trends in most European countries towards a PROGRESSIVE commercialisation of the electronic media.

As regards hertzian radio and television, there is a political commitment in several countries to add commercial services to the public service, eg in Belgium, Germany, Norway and Spain. Elsewhere political threats and pressures often give a glimpse of the spectre of the commercialisation of the waves, eg in Germany, Switzerland and even in Sweden.

Some of the new systems lend themselves by nature to extensive commercialisation, eg VIDEO, which is traded in the same way as printed or sound publishing in accordance with the laws of the market economy. The interactive applications of TELEMATICS will to a great extent be used for promotion and sales purposes. There are indeed risks that CABLE will not in turn be used substantially for commercial activities, and that news and original expression will be replaced by standardised mass entertainment. Finally, SATELLITE will be superimposed on all the media, in certain cases tending to break down what remains of the old structures of national media.

It must not be forgotten that the electronic ommunication INDUSTRY is regarded as one of the rare sectors that has some development possibility over the next 20 years. There is consequently a danger that technocratic and commercial considerations will combine to establish the supremacy of economic needs over cultural needs.

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In that case, commercialisation will be a political concession to technico-economic DETERMINISM; nonetheless, it will at the same time express the POWERLESSNESS or REFUSAL of states to look after public services themselves. Communication, not long ago regarded as a social value, will become part of business logic; as regards content, only the most profitable "deposits" will be used, and only the most affluent sections of society will have access thereto.

NB A SECREGATIONIST system has already been established in the United States as the cost of the new media has made them inaccessible to a large section of the population.

This is precisely the development which public interest INITIATIVES that are being taken inside and alongside traditional radio and television organisations should mitigate or counterbalance.

The latter are trying to adapt to the changes taking place around them. This adaptation is not easy. Throughout Europe, they are having a difficult time in an economic crisis that is imposing strict financial restraints on them. At the same time most of them are obliged to fight for their independence: in these days of disturbances and tension, governments and political parties tend to want tight political control over the functioning of radio and television.

Despite this unfavourable climate, which hinders the adaptation process, public radio and television organisations are taking several measures:

- The occupation strategy

This strategy is carried out by EXTENDING TRANSMISSION TIME, thereby diversifying programme schedules in order to serve a greater variety of audiences more satisfactorily. Eg morning television, recently introduced in Germany and the United Kingdom; Dutch television intends to double its transmission time within a few years (undoubtedly including advertising time); decentralisation in the form of local (Austria) or sub-regional (Germany) radio ...

- The multi-media strategy

This radio and television strategy consists in using the new systems by themselves or in connection with other initiatives. In Belgium, hertzian television is co-operating with community television stations in the field of cable, and is taking part in a video cassette distribution network set up by an independent body, the "Mediathèque de la Communauté Française". Swedish television is also preparing to distribute its own programmes on a public institution circuit. German organisations intend to be associated in pilot cable tests and the BBC is taking part in "pay television" ...

- The multi-national strategy

In several countries, satellite projects reflect a willingness on the part of radio and television organisations to co-operate beyond frontiers, particularly for the purposes of what is known in France as the "creation of a European cultural space".

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Groups of organisations have been set up to organise various other forms of co-operation, depending on the language or interest of the group concerned.

Some bodies operate outside Europe in an attempt to gain a foothold in the American audio-visual market, and in particular on cable satellite networks, for essentially economic reasons. Undoubtedly this development will be important for radio and television in Europe because in order to finance new initiatives, it will have to find ways of reconciling a certain type of commercial activity with the public service function.

One of the major requirements of an audio-visual policy in Europe would certainly be the strengthening of existing radio and television organisations in order to make them more independent, and to make them dynamic and flexible so that they can adapt effectively to new circumstances.

It is not by chance that most European countries opted a long time ago for the principle of public service in radio and television: its role reflects the values of a society and it has a decisive place in the system of communication as a whole.