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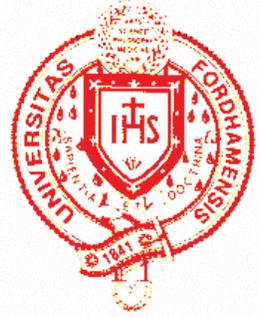
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WORKING PAPER

PERSISTENT AND EMERGENT DIVERSITY

POLICY CONCERNS IN AN EVOLVING MEDIA

ENVIRONMENT:

TOWARD A REFLECTIVE RESEARCH AGENDA

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Persistent and Emergent Diversity Policy Concerns in an Evolving Media Environment:
Toward a Reflective Research Agenda

Abstract

This paper illustrates the ongoing evolution of media diversity policy concerns in response to the changing technological, economic, and institutional dynamics of the contemporary media environment. This paper identifies persistent diversity policy concerns (i.e., those that are making the transition from the traditional to the new media policy agenda) and emergent diversity policy concerns (those that have arisen as a result of ongoing technological and institutional changes). Key points of focus for this analysis include the persistence of cultural diversity concerns such as trans-border content flows and emergent policy concerns surrounding the production and consumption dynamics of contemporary media users. This paper then extrapolates from these policy concerns the basic contours of a diversity research agenda that would reflect and inform these concerns.

Persistent and Emergent Diversity Policy Concerns in an Evolving Media Environment:
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Introduction

Technological and institutional changes in contemporary communications systems are forcing both policymakers and policy researchers to re-examine the role and function of diversity as a communications policy principle (Karppinen, 2009; Napoli, 2008; Owen, 2009). As a recent study on media pluralism prepared for the European Commission noted, “Technological and economic changes . . . are affecting established media and communications sectors . . . Traditional policy approaches . . . that were developed in an earlier era are being strained by these changes and there is a growing need to develop policy approaches appropriate for the contemporary and future environment” (K.U. Leuven, et al., 2009, p. 9).

Reflected in this statement is the fact that the reduced barriers to entry to content production and distribution brought about by the Internet have led to increases in available content, as well as to dramatic increases in the range of sources from which content can be obtained. Individuals and organizations of various stripes now stand alongside traditional media institutions as producers and distributors of content (see IDATE Consulting & Research, 2008; Napoli, 2009a). At least superficially, these technological developments address many of the concerns that provided the underpinnings of diversity-motivated regulations of traditional media institutions (Karppinen, 2009).

However, it is important to emphasize that even if technological change facilitates the achievement of traditional, established diversity policy objectives, this should not automatically negate the status of diversity as a fundamental communications policy principle. Rather, it simply means that policy interventions on behalf of diversity may no longer need to be as

extensive as perhaps they once were (but that the relevant monitoring should still be conducted). Or, as is perhaps more often the case when policymaking adapts to significant environmental or technological change, the points of observation and/or intervention need to be adjusted in order to better reflect changing environmental conditions (Karppinen, 2009). Such a shift may be a response to new, emergent threats to a particular policy principle that are a function of technological or environmental change, or they may simply be an effort to build upon the extent to which the principle can be further employed to maximize the public good (see Karppinen, 2009; Napoli, 2009b).

It is from this standpoint that this paper assesses the ongoing evolution of diversity as a communications policy principle and how this evolution should affect research that seeks to address the concerns of policymakers. The scope of this paper is limited in that it takes a somewhat pragmatic (one might even say applied) approach, in that it does not argue for a new agenda for diversity policy and (by association) diversity research. Rather, this paper simply assesses the current policymaking environment in terms of exhibited shifts in diversity policy priorities and seeks to extrapolate from these observations a diversity research agenda that would most effectively resonate with, and serve, these reconfiguring policy priorities. In this regard, this paper is intended as a tool for those policy researchers interested in directly addressing those policy issues and concerns that are most prominent in contemporary policymaking and policy advocacy discourse. Certainly, policy research can – and should – also serve to set – rather than simply respond to – policy agendas. The focus of this paper, however, is to extract from ongoing policy discussions those issues and concerns for which policymakers' demand for research would appear to be most immediate.

The first section of this paper briefly reviews how contemporary media system developments are to some extent diminishing concentration of media ownership in relation to diversity policy. As this section illustrates, this shift is a function of the increased choice available to content consumers and the lower barriers to entry available to content producers and distributors in the online space; as well as of the economic damage that this new media environment is inflicting on traditional regulated media institutions. The second section examines the media diversity concerns that either persist in this new media environment or that have emerged in response to it. In terms of *persistent* concerns, this paper considers concerns about cultural and linguistic diversity and transnational content flows, and how they are affected by the ongoing reconfiguration of contemporary media systems. In terms of *emerging* concerns, this paper addresses the range of emerging *user-focused* diversity concerns that are related to media users' consumption and production of media content. The final section builds upon these observations to offer the basic contours of a media diversity research agenda that would resonate with these shifting media diversity policy priorities.

The Decoupling of Media Concentration and Diversity

Although diversity is a rich and multi-faceted communications policymaking principle (see Napoli, 1999), over time it has become increasingly tied to concerns about concentration of media ownership (Napoli & Gillis, 2006). These concerns have been both national and international in their orientation (see, e.g., Just, 2009; Noam, 2009). That is, concerns about the effects of concentration of media ownership on various manifestations of diversity have been directed at both content flows within individual geographic areas (local markets, individual countries) as well as content flows across geographic borders (e.g. cross-national content flows, or national versus local content availability in local markets; see Gershon, 1996).

It seems reasonable to suggest that these concerns about ownership concentration peaked just as the Internet was beginning to dismantle and reconfigure many aspects of our traditional media system, with, for example, the highly contentious 2003 FCC review of its media ownership regulations in the U.S. (see, e.g., Napoli & Gillis, 2006), and in Europe the 2005 issuance by the European Commission of the Audiovisual Media Services Directive (Helberger, 2008). It is worth briefly highlighting an important contrast between these two regulatory responses, in terms of the extent to which the European Commission sought to extend its diversity objectives into the new media space (if somewhat tentatively; see McGonagle, 2008), whereas the FCC simply took the presumed diversity that exists online as a rationale to scale back its pursuit of diversity objectives in the traditional media space (see Burri-Nenova, 2007, Napoli & Gillis, 2006).

Recent technological and economic developments have certainly recast the traditional concerns about concentration of media ownership, for a number of reasons. First, *up to this point in time*, the dynamics of the new media environment have undermined the business models of most of the media industry sectors and organizations that have been the focal point of concern about ownership concentration. The business models of traditional media companies have been damaged in both marketplaces in which the economics and strategy of media industries traditionally have been based – the sale of content to audiences and the sale of audiences to advertisers (Napoli, 2010). And while one can certainly make a compelling case that policymakers should not concern themselves with preserving outdated business models (see Napoli, 2009b), there are legitimate concerns about whether the evolutionary path that contemporary media systems are following is one that will serve the information needs of the

citizenry as well as is necessary for democracies to function effectively (Knight Commission on the Information Needs of Communities in a Democracy, 2009).

On the content side, Chris Anderson's (2006) well-known "Long Tail" scenario serves as a useful shorthand for understanding today's media markets, in which consumers have access to an unprecedented array of content options, along with an unprecedented array of tools for locating preferred content in this sea of abundance. As a result, the competition amongst content options for consumer dollars is becoming more intense.

In addition, traditional media organizations are being confronted by the digital environment's nearly overwhelming pressure to make content available to audiences for free. In the online space, where so much content is available for free (both legally and illegally), and where organizationally-produced content must compete for audience attention with the ever-growing volume of user-generated content, it has proven quite challenging for most media organizations to charge for and price their content the way they traditionally have. As Stewart Brand famously stated, information wants to be both free and expensive (see Anderson, 2009); but in today's media environment, the forces that make information free to consumers seem to be overpowering the forces making information expensive.

Turning to the revenues that media organizations traditionally have derived from the sale of audiences to advertisers, technological changes are again having damaging effects to traditional business models. The relevant changes generally fall under the broad umbrella notion of fragmentation, which involves the fragmentation of content options both within (intra-media fragmentation) and across (inter-media fragmentation) media, as well as the fragmentation of audience attention across available content options (see Napoli, 2010). Here, it is the distribution of audience attention across the Long Tail that is proving challenging to stakeholders in the

audience marketplace. The supply and demand dynamics of audience attention have been dramatically disrupted, while at the same time the audience measurement firms that have historically provided the “currencies” for the audience marketplace are finding it increasingly difficult to measure the increasingly fragmented audience attention with the levels of accuracy and reliability demanded by advertisers and content providers (Napoli, 2010).

In addition, in both of these marketplaces, online distribution has meant that geography no longer serves as a meaningful mechanism for limiting the range of content options available to media consumers or the range of audiences reachable by advertisers, or, for that matter, the timing via which content is available to different geographic audience groups. Geographical boundaries therefore are becoming increasingly ineffective tools from the standpoint of media distribution strategy and pricing.

The end result of these developments is that policymakers are becoming increasingly willing to consider ownership concentration as a possible mechanism for preserving traditional media organizations and maintaining their contributions to the media system, and/or no longer see ownership concentration as a problem requiring regulatory intervention (see Karppinen, 2009; Owen, 2009).. We see this in the U.S., for instance, where both the Federal Communications Commission (2010) and the Federal Trade Commission (2010) are conducting thorough evaluations of the state of the U.S. media system and the appropriateness of various policy responses. Underlying both of these evaluations is the question of whether limitations on concentration of media ownership are either necessary or desirable in today’s media environment. Even long-standing advocates of media ownership regulations, such as FCC Commissioner Michael Copps, have begun to relax their stance in the face of the economic

declines of traditional media sectors such as the newspaper and broadcast television industries (Eggerton, 2009).

The goal here is not to address the questions of whether the negative effects of concentration of media ownership have been effectively remedied via technological changes, or whether allowing greater concentration of ownership represents an effective solution to the economic hardships confronting traditional media organizations (both of these issues remain very much open for debate), or, for that matter, whether preserving traditional media enterprises even represents an appropriate policy goal. Rather, the point here is that, from the standpoint of “policy windows” and the role they play in the dynamics of policymaking (see Kingdon, 2002), observation of the contemporary policymaking environment suggests that the window is being effectively closed by these developments, as policymakers simultaneously consider the diversity-enhancing effects (on some levels) of these technologies, and the damaging economic effects that these technologies are having on the traditional media sector that has long been the focal point of most diversity policies.

Beyond Ownership: Evolving Approaches to Diversity in the New Media Environment

The point here is that policymakers’ focus on media ownership is a central element of their concerns about media diversity can safely be described as on the wane. In today’s media diversity policy discourse, ownership is but one component of a shifting conversation about contemporary media production and consumption dynamics. In this regard, the diversity policy discussion is in some ways enlarging, but is certainly doing so in ways that involve the translation of traditional diversity concerns into new media contexts. In some instances, the situation is one of established diversity concerns migrating to new media contexts. In other instances, it is a case of essentially new diversity concerns emerging from the new technological

context of today's evolving media environment. An example of a *transitioning* and an *emerging* diversity concern are discussed below.

Persistent and Emerging Diversity Policy Concerns

As was noted above, formulating a forward-looking diversity research agenda that addresses the concerns of policymakers, it is useful to identify those concerns that we can describe as *persistent* (i.e., that are transitioning from the traditional media space to the new media space) and those that are *emergent* (i.e., that are emerging in response to the unique dynamics of the new media environment).

The Persistence of Cultural Diversity

Consider, for instance, the notion of cultural diversity, which has been perhaps one of the most persistent manifestations of the diversity principle in the communications sector (UNESCO, 1995, 2002). According to UNESCO (1995), cultural diversity is defined as

“the manifold ways in which the cultures of groups and societies find expression. . . .

Cultural diversity is made manifest not only through the varied ways in which the cultural heritage of humanity is expressed, augmented, and transmitted through the variety of cultural expressions, but also through diverse modes of artistic creation, production, dissemination, distribution and enjoyment, whatever the means and technologies used.”

(article 4, no. 2).

One aspect of the concerns about cultural diversity that has migrated from the traditional media space to the new media space has to do with concerns about cross-border content flows, and the extent to which content produced within a select few nations can come to dominate the audience attention and, consequently, the markets of other countries (Norris & Engelhart, 2008). This concern with what has been termed “national diversity” (i.e., the extent to which a multitude

of national cultures remain vibrant and resistant to submersion beneath a few dominant cultures; see Norris & Engelhart, 2008) is persistent – and perhaps even intensified – given the greater challenges to limiting the cross-border flows of content that characterize the new media environment.

In Europe, we have seen the elimination of national-level restrictions affecting the flow of programming across European nations, alongside the imposition of restrictions on the amount of non-European media content that can be distributed (see Council of the European Commission, 1989; Burri-Nenova, 2007). These efforts began with the *Television Without Frontiers Directive* (implemented in 1989), which sought to create a single European television market by eliminating restrictions that individual countries had placed on the importation of other European television networks, channels, and programming, but at the same time imposed quotas on the amount of non-European content that could be transmitted (see Council of the European Commission, 1989).

The subsequent refinement of the Television Without Frontiers Directive – the Audiovisual Media Services Directive – extended the TWFD regulatory apparatus into the new media space (using the terminology “non-linear audiovisual media services” in reference to various forms of online content provision), though very conspicuously refrained from imposing the quota system on online content providers, raising questions about whether a meaningful policy commitment to cultural diversity has been established in the new media space (Burri-Nenova, 2007).

As Burri-Nenova (2007) illustrates, the notion of the Long Tail that has come to serve as a useful framework for understanding the dynamics of contemporary media fragmentation and

audience empowerment (see Napoli, 2010) can usefully be applied to cross-border content flows in the online realm, and efforts to regulate them. As she notes:

The effects of a quota mechanism for non-linear services are quite unpredictable and may even have diametrically opposed outcomes. A first outcome is that consumers (being empowered by technology) would simply not choose European works and thus render any investment/catalogue quota ineffective. Another, rather different option is an application of the so-called “Long Tail” theory. This means that in the new environment of indefinitely diverse media, the consumer selection will constantly generate new and/or niche products. . . . Consumers will be stimulated to consume products that would otherwise not be available to them . . . and will thus induce markets to offer new types of content. . . . This may ultimately lead to a higher share of available and effectively consumed European works, which, if realized, will be a genuine expression of cultural diversity.” (pp. 1709-1710)

This uncertainty about the effects of the contemporary dynamics of media distribution and consumption on the prospects for a particular form (in this case, European-originated) content is borne out in the growing body of empirical literature seeking to confirm or refute the presence of the “long tail” effects postulated by Anderson (2006) (see Napoli, 2010, for a detailed assessment of this literature). It does indeed seem to be unclear at this point whether a media environment of unprecedented choice and sophisticated tools for identifying and accessing relevant content genuinely helps or hurts the prospects for content that has not traditionally resided in the “head.”

Another important element of the traditional concerns about cultural diversity that has transitioned to the new media context involves concerns about the diversity of languages

available in media content. Looking, for instance, at the discourse surrounding Internet governance, the bulk of the diversity-related discussions have focused on the linguistic diversity of the content available online (Napoli, 2008). For many Internet users, the potential benefits of the tremendous variety of content options available on-line from a vast array of sources essentially run aground against the fact that much of this information may not be available in their native language. According to recent estimates, there are more than 6,000 languages in the world. Ninety percent of these languages are not represented on the Internet. Fifty languages represent 99 percent of the content on-line (Napoli, 2008).

From numbers such as these arise concerns about whether desired standards of cultural diversity (as reflected in online linguistic diversity) are being met. From this standpoint, the normative underpinnings of efforts to enhance online access and participation for marginalized groups are seen not only in terms of granting members of these groups access to important information sources, but also in terms of diversifying the range of individuals and viewpoints that participate in the online public sphere.

The Emergence of User-Focused Diversity Concerns

The unprecedented technological changes we are seeing in our media system are, perhaps not surprisingly, resulting in the foregrounding of diversity concerns that have resided, until now, largely at the margins (at best) of mainstream communications policy discourse. Today, for instance, we are seeing a growing discussion develop around the changing relationship between media audiences and the media technologies and content providers that they access (see, e.g., Napoli, 2010).

This discussion is driven largely by today's increasingly interactive, on-demand media environment, as well as by the explosive growth of various forms of user-generated content and

the tools via which such content can be easily disseminated and accessed. As has been the case surrounding concerns about cultural diversity and cross-border content flows, attention to “long tail economics” has featured prominently in recent efforts by governmental and quasi-governmental organizations to make sense of the economic, cultural, and public policy – and, specifically, diversity – implications of today’s newly-empowered media user (see, e.g., IDATE Consulting & Research, 2008; Organisation for Economic Cooperation and Development, 2007).

We are already beginning to see policymaking that, to some extent, seeks to account for today’s more empowered media user. As Helberger (2008) notes in relation to European media policymaking:

“The changing role of viewers of audiovisual content was one of the driving factors that lead to the amendment of the original Television Without Frontiers Directive (now: Audiovisual Media Services Directive). On the one hand, the directive acknowledges that the information seeking habits of viewers are changing, viewers look more actively for information. . . . On the other hand, it concludes that viewers have more choices and possibilities to influence the audiovisual contents that they receive; they are not any longer the powerless viewers they used to be.” (p. 9)

Similarly, the research that informs policymaking is now beginning to encompass concerns about the extent to which the audience-empowering capabilities of contemporary communications systems are being realized. For instance, the European Union’s hugely ambitious and multi-faceted Media Pluralism Monitor considers not only traditional indicators of the health of a media ecosystem such as diversity of media ownership, viewpoints, and content types, but also indicators related to the extent to which traditional media are engaged with new media the extent to which online media platforms support public participation, and the extent to

which citizens and citizens groups engage in online political activity (K.U. Leuven, et al., 2009).

It would seem, however, that policymakers would like to see this line of inquiry extended. As was noted by a recent report by the Council of Europe (2008) on measuring media diversity, “It would...be useful to explore the use and creation of media by the audience, which is changing with the new technologies, and examine if it is nowadays enough to offer what has traditionally been considered important information for a democracy” (p. 13).

Certainly, it remains an open question as to whether, or to what extent, policymakers should intervene in ways intended to enhance the extent to which a diversity of media users take advantage of the variety of ways in which they can become more empowered participants in the media system, or perhaps intervene to enhance the extent to which this growing output of content generated by individual (rather than institutional) communicators is accessed by audiences (see Napoli & Sybblis, 2007). Should policymakers intervene in the dynamics of media consumption in order to ensure that the pattern that develops is one of the head of the long tail shrinking and the tail thickening, rather than one of the head thickening and the tail, at best, lengthening (see Helberger, Leurdijk, & de Munck, 2010)? And if so, what are potentially effective methods of doing so? Answers to these questions are beyond the scope of this paper. Rather, the point here is that the dynamics of media users/consumption and production behaviors are now a point of focus in contemporary media diversity policy discourse to a perhaps unprecedented extent (Napoli & Gillis, 2006).

Toward a Reflective Research Agenda

The previous sections have highlighted primary examples of the persistent and emergent diversity policy concerns in today’s reconfigured media environment. This section seeks to

extrapolate from these discussions the possible focal points for a research agenda that most effectively reflects the predominant persistent and emergent diversity policy concerns.

The relationship between diversity research and diversity policy has been a tumultuous one. The empirical research that informs diversity-motivated communications policies has increasingly come under criticism from a variety of quarters, including scholars, advocacy groups, policymakers, and the courts (see Karppinen, 2006; Napoli & Gillis, 2006). It has certainly been questionable whether diversity research has adequately captured the complexities associated with translating traditional diversity concerns into genuinely useful analytical tools for policy decision-making. Now, as the nature of policymakers' diversity concerns either transfer to new media platforms or are reconceptualized to reflect the altered dynamics of today's media environment, diversity policy research needs to move well beyond its traditional, somewhat limited focus on criteria such as television program types and the advertising or audience market shares of different traditional media outlet owners.

Today, empirical diversity assessments conducted for and by policymakers need to move beyond the assessment of institutional structures and outputs, and to better integrate "de-institutionalized" sources of ideas and viewpoints into the calculus. We have seen some progress in this direction in some of the ongoing efforts to assess the state of linguistic diversity in the online realm (for a review, see Napoli, 2008), but what has been lacking from this body of research are efforts to consider the extent to which on-line attention is distributed across a diverse array of linguistic groups (i.e., exposure diversity). This is an omission that has not gone unnoticed, even if it has not yet resonated strongly within policy discourse or policy research (for exceptions, see Hindman, 2009; Pimienta, 2005). As a UNESCO (2005) report on linguistic diversity on the Internet noted, "We can easily produce a random count of Internet pages by

using any number of commercial search engines, but we cannot judge how often Web pages are read . . .” (p. 6).

One important avenue of inquiry along these lines should involve applying Anderson’s (2006) “long tail” template. That is, researchers should seek to map out the presence or absence of long tails in which, rather than the range of individual online content options serving as the X axis, the national points of origin for content would serve as the X axis instead. In this way, we could answer questions such as to what extent is audience attention online focusing on content that originates in the U.S. and a select few other countries? Does the traditional 80-20 rule of content consumption apply when the national bases of individual content producers/distributors serves as the central unit of analysis? Are we seeing the development of long tail (Anderson, 2006) or winner-take-all (Hindman, 2009) patterns in the distribution of audience attention across the content produced and distributed from different national points of origin?

Such a line of inquiry is reflective of persistent calls (see, e.g., Napoli, 1999; Webster, 2007) for policymakers and policy researchers to pay more attention to the dynamics of audiences’ media consumption. As Karppinen (2009) states, “One thing that seems evident . . . is that instead of analyzing only what is produced or what is available, more emphasis needs to be put on user competencies, questions of media usage, digital literacy, and other aspects related to exposure diversity” (p. 166).

But, importantly, as the above statement indicates, it is not just audiences’ *consumption* behaviors that need to be a part the contemporary diversity research agenda. As the previous discussion about policymakers’ increased focus on user-generated content tells us, audiences’ *production and distribution* behaviors need to be factored into the analytical calculus as well. Policymakers now need detailed portraits what types of individuals are producing what types of

content, and what types of individuals are not taking part in the online public sphere, and, most importantly, what technological or institutional impediments might there be to various forms of online participation.

And, as this last statement would suggest, an important point of focus for future research should be the developing points of intersection and integration between traditional media organizations and individual media users/content producers. That is the structure, operation, and practices of the various online platforms via which media organizations aggregate, monetize and (in many instances) analyze of individual media users represent perhaps the most important nexus between old and new media systems and between old and new media diversity policy concerns.

Conclusion

This paper has sought to illustrate the ongoing evolution of media diversity policy concerns, in an effort to inform and guide future diversity research. As this paper has illustrated, media ownership concentration is essentially moving from the center to the periphery of the media diversity policy agenda. However, there are other traditional media diversity policy concerns that are persisting in the new media space, where they reside alongside new, emerging concerns that are a byproduct of fundamental and dramatic reconfigurations of contemporary media systems. This paper has described some avenues of research that would address what are becoming the defining diversity policy concerns of this digital media age.

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