

Diminished, Enduring, and Emergent Diversity Policy Concerns in an Evolving Media Environment

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This article examines the evolution of media diversity policy concerns in response to the changing technological and institutional dynamics of the media environment. It identifies those diversity policy concerns that are receiving less attention from policymakers in light of ongoing technological and institutional changes (*diminished*), those that are transitioning from the traditional to the new media policy agenda (*enduring*), and those that have arisen as a result of ongoing technological and institutional changes (*emergent*). This article then outlines the contours of a diversity research agenda that would reflect and inform these concerns.

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; Owen, 2009). As a recent study prepared for the European Commission on the closely related principle of media pluralism 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)

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 &

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Research, 2008; Napoli, 2010). On a superficial level, these technological developments address many of the concerns that provided the underpinnings of diversity-motivated regulations of traditional media institutions (Karppinen, 2009).

However, even if technological change facilitates the achievement of traditional, established diversity policy objectives, this does not automatically negate the status of diversity as a fundamental communications policy principle. Rather, it 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 still needs to 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 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 be an effort to build upon the extent to which the principle can be employed to further enhance the public good beyond previously set objectives (see Karppinen, 2009).

This article assesses the ongoing evolution of diversity as a communications policy principle and how this evolution should affect research that seeks to address and inform the concerns of policymakers. Thus, this article employs a pragmatic, applied approach to assessing the current policymaking environment—in terms of exhibited shifts in diversity policy priorities—and then extracts from these observations a diversity research agenda that might resonate with, and serve, these reconfiguring policy priorities.

The first section focuses on those diversity policy concerns that appear to be of diminished importance to communications policy makers. It considers how contemporary media system developments have, to some extent, diminished policy makers' concerns about concentration of media ownership in relation to diversity policy. The second section examines those media diversity concerns that endure in this new media environment, illustrating how concerns about cultural diversity and transnational content flows persist among policy-making bodies amid the ongoing reconfiguration of contemporary media systems. The emerging concerns addressed in the third section include the range of emerging user-focused diversity concerns that are related to media users' consumption and production of media content. The final section offers the contours of a media diversity research agenda that would respond to these shifting media diversity policy priorities.

Diminished Diversity Policy Concerns: The Decoupling of Media Concentration and Diversity

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

As the Internet began to dismantle and reconfigure many aspects of our traditional media system, these concerns about ownership concentration peaked with, for example, the highly contentious 2003 FCC review of its media ownership regulations in the United States (FCC, 2003), the subsequent successful court challenge to this decision (*Prometheus Radio Project vs. Federal Communications Commission*, 2004), and in Europe, the 2007 issuance by the European Commission of the Audiovisual Media Services Directive (see Helberger, 2008).

It is noteworthy that the European Commission (2007) sought to extend its diversity objectives into the new media space (McGonagle, 2008), while the FCC (2003) used the presumed diversity available online as a rationale to scale back its pursuit of diversity objectives in the traditional media space (see Burri-Nenova, 2007; Napoli & Gillis, 2006). These divergent approaches highlight the ongoing debates over whether policy principles established within the traditional media realm should be extended into new media contexts and whether the characteristics of the new media environment inherently solve the concerns that traditionally defined diversity-motivated media policies (e.g., see Napoli, 2009; Owen, 2009).

Recent technological and economic developments have recast the traditional concerns about concentration of media ownership and its relationship to diversity policy for a number of reasons. First, to date, the dynamics of the new media environment have undermined the business models of most 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. It is certainly questionable whether it is appropriate or advisable for policy makers to try to preserve outdated media business models (see Napoli, 2009); however, there remain legitimate concerns about whether the evolutionary path that contemporary media systems are following best serves the information needs of citizens and the needs of a well-functioning democracy (e.g., Knight Commission on the Information Needs of Communities in a Democracy, 2009).

As a result, policy makers appear increasingly willing to consider ownership concentration as a 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). In the United States, both the Federal Communications Commission (2010a, 2010b, 2011) and the Federal Trade Commission (2009, 2010) have conducted evaluations of the state of the U.S. media system and the appropriateness of various policy responses. Underlying these evaluations is the question of whether limitations on concentration of media ownership are necessary or desirable in today's media environment. Even staunch 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 FCC's ongoing iteration of its quadrennial media ownership policy review (see FCC, 2010b) is taking place amid what appears to be substantially less scrutiny and publicity than was present in previous

iterations; and, according to some insider accounts, the Commission's initial plans to establish a comprehensive empirical record were scaled back. It seems plausible that this iteration of the media ownership proceeding could produce further relaxations of existing ownership rules (e.g., of newspaper-broadcast cross-ownership rules) premised largely on the need to preserve the professional production of news and public affairs content in an environment in which the established economic models of professional journalism are being undermined.

It is important to emphasize that the goal here is not to address whether negative effects of concentration of media ownership were addressed by technological changes; whether allowing greater concentration of ownership provides an effective solution to the economic hardships confronting traditional media organizations; or whether preserving traditional media enterprises is an appropriate policy goal. The key point here is that, from the standpoint of "policy windows" and the role they play in the dynamics of policymaking (see Kingdon, 2002), it seems that the window is being closed by the technological and economic developments affecting the media system.

The bottom line is that policy makers' focus on media ownership as a central element of their concerns about media diversity is on the wane. In today's media diversity policy discourse, ownership is only one component of a shifting and expanding conversation about contemporary media production, distribution, and consumption dynamics.

Enduring Diversity Policy Concerns: Cultural Diversity

Some established media diversity policy priorities are transitioning in parallel with the technological and institutional transitions underway in our media system. Consider the notion of cultural diversity, a well-established manifestation 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 concern about cultural diversity is that its migration 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 markets of other countries (Norris & Engelhart, 2008). This concern about "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 contemporary media environment.

Europe has seen the elimination of national-level restrictions affecting the flow of programming across European nations and the imposition of restrictions on the amount of non-European media content that can be distributed (see Burri-Nenova, 2007; Council of the European Commission, 1989). 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 which also 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 (Council of the European Commission, 2007)—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. However, the Council of Europe conspicuously refrained from imposing the quota system on online content providers, raising questions in some quarters about whether a meaningful policy commitment to cultural diversity had been established in the new media space (Burri-Nenova, 2007).

This hesitancy to apply quota mechanisms to online content flows arose from uncertainty as to whether such mechanisms would effectively preserve and promote cultural diversity, as opposed to from a lack of concern about cultural diversity. Burri-Nenova (2007) noted the following:

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) of content is borne out in the empirical literature that seeks to confirm or refute the presence of the long tail effects that Anderson (2006) postulated (e.g., Elberse, 2008; also see Napoli, 2011, for a detailed assessment of this literature). It remains unclear whether a media environment of unprecedented choice and sophisticated tools for identifying and accessing relevant content helps or hurts the prospects for content that has not traditionally resided in the “head” (Napoli, 2011). The key point is that cultural diversity concerns endure in today’s media environment, though there remains substantial uncertainty about the most effective mechanisms for protecting and promoting it.

In transitioning to this evolving media environment, the notion of cultural diversity has evolved as well. For instance, concerns about the diversity of languages available in media content has emerged as a prominent extension of traditional cultural diversity concerns, as online access and distribution become increasingly central to the media system. Looking, for instance, at the discourse surrounding Internet governance and at the debates and discussions at the center of the United Nations' annual Internet Governance Forum, the bulk of the diversity-related discussions have focused on the linguistic diversity of the content available online, and the bulk of these discussions are grounded in normative concerns about cultural diversity (Napoli, 2008).

The primary concern here has been that, for some Internet users, the potential benefits of the tremendous variety of content options available online from a vast array of sources essentially run aground against the fact that the information is not available in the user's native language. According to recent estimates by the Internet Governance Forum's Dynamic Coalition on Linguistic Diversity (2010), "there are more than 6,000 languages in the world, though only about 350 are available in digital formats." From numbers such as these arise concerns about whether desired standards of cultural diversity (as reflected in online linguistic diversity) are being met; and whether there is a role for policy makers to play, given that the level of linguistic diversity found online is not only a function of the linguistic diversity of the population of Internet users (a digital divide-related issue), but also a function of the processes and protocols associated with how domain names and numbers are registered by ICANN (Napoli, 2008).

As should be clear, concerns about cultural diversity encompass the media user's ability to engage with communications technologies in terms of both consumption and expression, as reflected in the UNESCO's definition. The normative underpinnings of efforts to enhance online access and participation for marginalized groups are seen in terms of diversifying the range of individuals and viewpoints that participate in the online public sphere, as well as in terms of the degree of access to important information sources that the members of these groups have. Again, as was the case with the media ownership discussion, the goal here is not to address whether these are appropriate points of focus for policy makers, but rather to illustrate that such concerns are crystallizing into a distinctive point of focus in the diversity policy discourse in which the unit of analysis is more granular than has ever been the case in the realm of media diversity policy. This emergent emphasis on user-focused diversity is discussed next.

Emergent Diversity Policy Concerns: User-Focused Diversity

Today, policy discussions are developing around the changing relationship between media audiences and the media technologies and content providers that they access. This discussion is driven largely by an increasingly interactive, on-demand media environment and by the explosive growth of various forms of user-generated content and the tools via which such content can be easily disseminated and accessed. Diversity policy concerns are de-institutionalizing, as the focus among policy makers and policy analysts is extending beyond the traditional boundaries of defined media institutions and encompassing media users, as well as their media consumption and production activities.

The term *user-focused diversity* is being employed here to capture the more granular analytical lens that is finding its way into diversity policy discourse. The sphere of diversity policy is extending beyond its traditional, institutionally-focused boundaries, thereby incorporating concerns that have long resided at the margins of mainstream diversity policy priorities.

Policymaking has begun to take into account today's more empowered media user (see, e.g., Organisation for Economic Cooperation and Development, 2007). 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, research that informs policymaking is beginning to address concerns about the extent to which the audience-empowering capabilities of contemporary communications systems are being realized. For instance, the European Union's ambitious and multifaceted Media Pluralism Monitor considers traditional indicators of the health of a media ecosystem—diversity of media ownership, viewpoints, and content types—and also indicators related to the extent to which the following occur: (a) traditional media engaging with new media; (b) online media platforms supporting public participation and citizens; and (c) citizens groups engaging in online political activity (K. U. Leuven et al., 2009).

The FCC's (2011) wide-ranging Future of Media proceeding was primarily concerned with the future role and function of traditional institutional media such as broadcast and cable television, radio, and newspapers. But here again, policy makers also are extending into the realm of the production activities of individual media users. For example, the Commission asked questions such as: "How can communities best make use of citizens' talents and interests in the creation, analysis, curating, and sharing of information" (FCC, 2010a, p. 4)?

What role will and should user-generated journalism play? In what ways can it improve upon traditional journalism, and in what ways can it not substitute for traditional journalism? How can the quality and effectiveness of citizen journalism be further improved? (FCC, 2010a, p. 8)

These questions extend beyond the FCC's traditional regulatory mandate to preserve and promote competition, localism, and diversity, yet the Commission clearly considers them relevant to the achievement of these goals. What answers and policies these questions might yield is less certain. The FCC's (2011) Future of Media report was notable for its hesitancy to put forth any ambitious policy interventions that directly addressed the provocative questions raised in its initial inquiry (i.e., FCC, 2010a). It remains debatable whether policy makers should intervene to enhance either the diversity of

media users by empowering new participants in the media system or the audience access to the growing output of content generated by individual (rather than institutional) producers (see Helberger, Leurdijk, & de Munck, 2010).

Finally, a growing concern within contemporary communications policy discourse involves the extent to which increases in the diversity of sources and content that are facilitated by the tremendous bandwidth and diminishment of traditional gatekeepers that characterize many new media platforms affect the consumption dynamics of individual media users.

Some policy-making bodies traditionally factor questions of exposure diversity into their analytical calculus. The Netherlands' Media Authority, for instance, actively assesses the extent to which a diversity of content is both produced and consumed (van Cuilenburg, 2002). Concerns in this vein also began to emerge within the FCC's 2003 media ownership proceeding, when the Commission tried to factor individual media outlets' potential audience reach into their calculus for determining each outlet's overall contribution to diversity. Ironically, the FCC was rebuked by the U.S. Court of Appeals for the Third Circuit for neglecting each outlet's actual audience reach (*Prometheus Radio Project vs. Federal Communications Commission*, 2004; Napoli & Gillis, 2006).

In the FCC's Future of Media proceeding, the Commission asked a range of questions that reside at the intersection of the diversity principle and the dynamics of users' media exposure patterns. For instance, the Commission asked, "Are media consumption patterns different in minority communities" (FCC, 2010a, p. 4)? This question addresses the possibility that diversity of exposure could be a function of the demographic diversity of the media users. The Commission also asked whether:

Compared to earlier decades, are Americans more or less likely to seek and find more specialized media (*i.e.*, that focused on a specific topic, appealing to a specific demographic group, or promoting a similar ideology or worldview)? What are the positive and negative consequences of such patterns? (FCC, 2010a, p. 5)

These questions address the dynamics of how media users are navigating today's increasingly fragmented media environment. They reflect the ongoing debate over whether an environment of unprecedented choice in which users have access to increasingly sophisticated search, recommendation, and navigation tools is one in which media users actually diversify their media consumption (Anderson, 2006; Hindman, 2009). If so, is the possible fragmentation of audiences into specialized "silos" ultimately beneficial from both cultural and political standpoints (e.g., see, Sunstein, 2007; Webster, 2007)?

Questions of the relationship between technological change and the diversity of users' media consumption patterns also relate to contexts in which policy makers need to assess the practical significance of the availability of wide ranges of sources and content options. To what extent should the existence of this diversity matter if little of it is being consumed? The FCC (2010b) provocatively asked in its most recent media ownership proceeding, "As an alternative to measuring the 'supply' of content to assess viewpoint diversity, should we take a 'demand side' approach and utilize measures of audience satisfaction and media consumption as proxies for viewpoint diversity" (p. 22)? Similarly, with regard to

assessing source diversity, the Commission also asked, "What role should consumer satisfaction or media consumption play in evaluating source diversity" (p. 23)? Employing such approaches could have dramatic implications, since the vast majority of available content would have little impact on any consumption-oriented diversity metrics, given the low levels of exhibited demand, as reflected in audience sizes (unless, of course, such content is considered in terms of its aggregate ability to attract audience attention; see Anderson, 2006).

Should the diversity of exposure be something that policy makers try to influence to produce a particular socially desired distribution of audience attention? Or should diversity function as a gauge for determining the extent to which the existence of diverse sources and content options should impact policy decision making? Either way, policy makers now recognize the need to understand the exposure patterns of media users in relation to diversity-motivated policies.

Toward a Reflective Research Agenda

Given the diminished, enduring, and emergent diversity policy concerns in today's reconfigured media environment, what are the possible focal points for a research agenda that effectively reflects the predominant enduring and emergent diversity policy concerns?

The relationship between diversity research and diversity policy remains tenuous. The empirical research that informs diversity-motivated communications policies has received substantial scrutiny by scholars, advocacy groups, policy makers, and the courts (see Karppinen, 2006; Napoli & Gillis, 2006). It is doubtful that diversity research has adequately captured the complexities associated with translating traditional diversity concerns into useful analytical tools for policy decision making. As policy makers' diversity concerns continue to move toward new media platforms or are reconceptualized to reflect the altered dynamics of the contemporary media environment, diversity policy research should move beyond the traditional focuses on television program types, advertising, or audience market shares of different traditional media outlet owners.

The nature of the ongoing shift in policy makers' media diversity concerns suggests that the long-standing tradition of seeking to determine the nature of the linkage between the diversity of ownership of traditional media outlets and the diversity of content provided by these outlets has less resonance within the policy-making community. A cottage industry in such research emerged at the height of concerns about ownership concentration, but never adhered around widely accepted methodologies or conceptual definitions. Even research examining long-central questions about whether certain types of traditional owners perform "better" than do other types of owners in terms of criteria such as the provision of local news and public affairs content (e.g., see Crawford, 2007) is less valuable to policymakers today, unless the analytical frame is expanded to incorporate the broader media ecosystem in which such outlets operate (e.g., see Project for Excellence in Journalism, 2010).

Today, empirical diversity assessments conducted for and by policy makers should move beyond the assessment of institutional structures and outputs, and better integrate "de-institutionalized" sources of ideas and viewpoints into the analytical calculus. There has been some progress in this direction in

some efforts to assess the state of linguistic diversity in the online realm (for a review, see Napoli, 2008), but even here, the methodological challenges have grown more complex, and more sophisticated research is needed to assure that the state of knowledge about linguistic diversity online keeps pace with the pace of technological and behavioral change (see Dynamic Coalition on Linguistic Diversity, 2010).

Moreover, research in this area has tended to ignore the extent to which online attention is distributed across a diverse array of linguistic groups (i.e., exposure diversity). This omission has been noted, but has not yet resonated strongly within either policy discourse or policy research (for exceptions, see Hindman, 2009; Pimienta, 2005). One 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 avenue of inquiry along these lines should involve applying Anderson's (2006) long tail template. Researchers should map 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. This approach could answer questions about audience attention online to content that originates in the United States and elsewhere. Does the traditional 80-20 rule of content consumption apply when the national bases of individual content producers/distributors serve as the central unit of analysis? Do long tail (Anderson) or winner-take-all (Hindman, 2009) patterns in the distribution of audience attention develop across the content produced and distributed from different national points of origin?

This line of inquiry reflects persistent calls (e.g., see Napoli, 1999; Webster, 2007) for policy makers 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)

A contemporary diversity research agenda also needs to address more than audiences' consumption behaviors and devote more attention to audiences' production and distribution behaviors. As noted by a recent Council of Europe report (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)

Policy makers need detailed portraits of what types of individuals are producing what types of content and of what types of individuals are not taking part in the online public sphere, as well as information on the technological or institutional impediments that hamper various forms of online participation.

And future research should develop points of intersection and integration between traditional media organizations and individual media users/content producers. The structure, operation, and practices

of the various online platforms through which media organizations aggregate, monetize, and often analyze the output of individual media users represent an important nexus between old and new media systems and between old and new media diversity policy concerns.

Conclusion

Media diversity policy priorities are evolving in conjunction with the technological, economic, and institutional developments affecting our media system. To some extent, media ownership concentration is moving from the center to the periphery of the media diversity policy agenda. Other traditional media diversity policy concerns are enduring 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. As a result, there are multiple avenues for future research to address and inform the evolving diversity policy concerns of this digital media age.

For media diversity researchers, conducting research that effectively addresses the concerns of policy makers has always been challenging, given the complexities inherent in operationalizing a multifaceted policy principle such as diversity on a scale that allows policy makers to feel comfortable acting on the results. As this analysis clearly suggests, these challenges are becoming more pronounced, as the structure of media systems and the dynamics of content flows grow more complex and as the analytical lens employed by policy makers expands across more media platforms and across an increasing range of mediated activities.

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