

## **Comparative Research, System Change, and the Complexity of Media Systems**

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This commentary reflects on the implications of new media and change in media systems for comparative analysis, focusing particularly on the question of whether increased complexity and fluidity mean that the concept of media systems is no longer relevant to comparative research or that a national media system as a unit of analysis is no longer relevant. It considers the nature of systems theory in general and the place of complexity and variation in the systems perspective. It then goes on to reflect on how to think about new media in relation to existing national media systems, drawing on the concept of path dependence. It closes with reflections on methodology in comparative analysis.

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We find ourselves today in a period when the existing scholarship on media is challenged by what seems to be a rapid pace of change in media systems and an increased level of complexity. This is driven by the rise of new media and by related crises that in many places have arisen in the institutional basis of established media institutions. It is also, in many cases, driven by change in political systems, which may be related but is no doubt not reducible to the rise of new media, as in much of the West, for example, where established political party systems have to a significant extent broken down.

In this context, considerable discussion has emerged about what the rise of digital media and related changes in the media landscape mean for comparative analysis. What new variables do we need to add to incorporate new media into comparative analysis? How do new media change media systems, and what kinds of reconceptualizations do we need to make to understand the changes they have wrought? Beyond these kinds of questions, at a deeper level lies the issue of whether these changes bring into question the concept of media system itself as a central focus of comparative analysis; related is whether they bring into question the focus on a national media system as a unit of analysis. The argument that is often made focuses on complexity, change, and globalization: The question is whether media landscapes are becoming so complex and so fluid that the concept of media systems is no longer useful, or alternatively whether the boundaries of national media systems have become so fuzzy that they no longer make sense as units of analysis.

I am not convinced that we should abandon the concept of media systems, and in this article, I argue for its continuing relevance. At the same time, it is clear that our existing conceptualizations of

media systems need to be revised as those systems change and that we need to think more deeply about the nature of a system itself in order to conceptualize the kinds of changes going on.

### **Change, Complexity, and the Concept of System**

When Paolo Mancini and I wrote *Comparing Media Systems* (Hallin & Mancini, 2004), we did not elaborate much on the basic concept of a system; we tended to take it as a kind of common sense. The main exception to this was the fact that we sought to make clear that we did not intend to invoke the Parsonian tradition of systems theory, which is based on evolutionist assumptions about a process of modernization in which social institutions become increasingly differentiated. For that reason, we included an extended critique of the idea that media systems move naturally toward greater differentiation—toward specialization, professionalization, and separation of journalism and cultural production from politics and from the market. It is, of course, increasingly clear in the current period that this evolutionist perspective is not correct.

Since the publication of the book, I have increasingly felt the need to clarify the basic concept of a system (Hallin, 2015), as many misunderstandings of our argument in *Comparing Media Systems* seem to result from assumptions about the nature of a system that I think are not correct. I am thinking here particularly of the idea that a system is by its nature monolithic and also static, that it is a big, unitary, unchanging structure—to which we would contrast the fragmentation and dynamism of the current period.

It is true that one important use of systems theory is to explain stability. I first became interested in social science in the 1970s. This was a time when people were very focused on the possibility of social change, and also discouraged that change seemed so hard to bring about. And many people, even beyond academia, turned to the concept of systems to understand this: Why, for example, could you elect new people to political office, but patterns of practice and structures of power would not change? Systems are often hard to change. An important focus of my current research, which I draw on for examples from time to time in this article, is Latin American media systems. One pattern that has been common in Latin America in recent years is the rise of populist governments on the political left, which launch efforts to transform the media system in order, as they see it, to democratize a traditionally oligarchic system. This occurred, particularly, in Venezuela under Hugo Chávez, Ecuador under Rafael Correa, Bolivia under Evo Morales, and Argentina under Kristina Fernández de Kirchner. These regimes did bring about major change in certain ways, expanding the state sector and community media, producing an increase in popular mobilization around media policy, and also producing highly polarized media landscapes often referred to in Latin America as *guerras mediáticas*, or media wars. And yet at a deeper level, one could argue that they end up reproducing familiar patterns, just with different people in power—patterns of clientelism, patrimonialism, and instrumentalization of media that have been referred to by Waisbord (2011) as “pervasive patrimonialism” and by Guerrero and Marquez-Ramírez (2014) as a “captured liberal” model of media systems. Important elements of underlying systems seem to be more persistent than governing regimes, or particular media organizations, or, often, legal structures.

It is also true that the concept of path dependence is an important part of the systems approach, that is, the idea that the way a system can develop in the future is shaped by its previous development.

The concept of path dependence is central to the argument of *Comparing Media Systems*, and I say more about how it may apply specifically to the understanding of new media later in this article. But it is important to note here that path dependence does not mean that things simply always stay the same, only that directions of change in a system are shaped by its past.

It is finally true that the media systems discussed in *Comparing Media Systems* were relatively stable in important ways for a significant period of time in the late 20th century. How long this stability lasted varied from country to country. But there was a kind of equilibrium in the systems we covered in *Comparing Media Systems* that made them look quite stable relative to other historical periods, such as today. It should be noted, however, that even with these Western systems, in this relatively stable "high modernist" period (Hallin, 1992), there was considerable change; for example, commercial newspapers increasingly displaced party newspapers and broadcasting expanded and was eventually commercialized. This was the period of the "mediatization of politics," the shift from party democracy to audience democracy in Western countries, as Bernard Manin (1997) puts it, and these changes are important to understanding what is going on now, for example, with populist politics. In *Comparing Media Systems*, our main focus was on the cross-national comparison, and we tended to represent these systems as they were at the height of this period of equilibrium, and not to focus until late in the book on forces of change.

In any case, although systems can be relatively stable over significant periods of time and often have structural dynamics that preserve important elements of their basic structure, they are not inherently stable or static, and I argue that the systems perspective is as important for understanding change as for understanding stability.

What is a system? Basically, a system is a set of interrelated elements. Ernest Laszlo (1972), who is one of the most important figures in the articulation of general systems theory, identifies three basic characteristics of a system:

1. Irreducibility is the idea that a system is a whole, that it has characteristics that are only comprehensible at the level of the system as a whole, and that it is impossible therefore to reduce it to its parts or even to make sense of them without reference to this whole.
2. Boundary maintenance is related to the idea that systems are relatively autonomous and cannot be reduced to effects of other systems. This idea is also related to some of the elements of stability in systems, that is, that they do function to maintain characteristics that distinguish them from other systems.
3. Autopoiesis is the idea that systems create themselves through their own operations and responses to their environments. This is related to change, of course; systems in this conception are always in a process of becoming.

Two things here are crucial to stress. First, systems are not homogeneous. Systems are sets of elements that are interrelated. The fact that those elements are interrelated does not imply that they are

similar or that all operate according to the same logic. A media system is typically made up of many different institutions, different sectors that often operate according to quite different logics. Often these may conflict or compete with one another; they do, however, interact with one another and influence one another, and their interactions may produce important commonalities in their practices or logics. The Bourdieuan concept of field theory gets at this (Benson & Neveu, 2005), and is a close relative of the systems perspective with its idea of a journalistic field in which different agents with different degrees and sources of capital compete, but that can also be understood as a single field in which all actors are in some important way oriented toward a common identity as journalists. Western media systems have always consisted of diverse forms of journalism that competed: the party press, the commercial press, elite and tabloid media, public service broadcasting, and so on. Often these evolved in different historical periods, when the political environments and cultural assumptions were different, and in some cases they were deliberately set up not to operate according to the same logic as the media that existed when they were established, as public service broadcasting, for example, was often set up not to be partisan in the way the press was. The main point of systems theory is that we cannot understand the individual components of the system without understanding the pattern of their relationships.

The media systems we describe in *Comparing Media Systems* were dominated to varying degrees by fairly centralized media, such as public service broadcasting or big commercial newspapers, so that their degree of homogeneity was probably higher than some systems. But homogeneity is a variable of systems, not a characteristic of a system as such. Different systems are characterized by different degrees of homogeneity, and it is something that can change over time within a particular system.

Systems are also not static. A system is not an entity with a fixed set of characteristics. It has different states that arise as its different elements interact with one another and as it is affected by its environment. One way to think about this is that a system involves distinctive patterns of variation.

Some of this change or variation is short term; we could call it “conjunctural variation.” Anyone who studies a particular media system in detail knows that it does not function in the same way in all circumstances, and often media scholarship is focused largely on understanding this variation. The “indexing hypothesis” (Bennet, 1990) and related research in political communication are examples of this, as they demonstrate that news media in Western political systems vary considerably in their relation to political elites. They may rather narrowly and passively reflect elite perspectives when elites are united, but they may be open to a much wider range of views and be more active in interpretation and political mediation when elites are in conflict with one another. One classic article (Lawrence, 2010) expanding on the indexing hypothesis—by exploring the independent effect of the characteristics of events in shaping varying news responses—is subtitled “The Dynamics of News Coverage of Police Use of Force” because media are dynamic in the way they respond to varying constellations of events and alignments of political forces.

Some change is long term because important sets of relationships are altered in lasting ways. We may rethink the way we conceptualize a particular media system or rethink our categories for what types of media systems exist in general, although it will no doubt take time to do this coherently, particularly because it is often difficult to know whether particular changes are long or short term. Will the Trump

presidency, for example, permanently alter the U.S. media system? Or will it prove only a temporary deviation in its evolution? It will be many years before we can know this with any clarity.

Long-term change produces particularly interesting and challenging conceptual issues for comparative analysis. Do we conceptualize a particular set of changes as simply the evolution of a particular system as it adapts to external shocks and internal contradictions? Do we conceive of a particular case (i.e., a national media system) as shifting from one media system model to another or becoming hybridized? Or do we think of this kind of change as a shift in the system from one state to another, consistent with a pattern of variation that is characteristic of that type of system? Nechushtai (2018) argues that the U.S. media system has shifted from the "liberal" model in the sense that the term is used in *Comparing Media Systems* to a "polarized liberal" model, a kind of hybrid between the polarized pluralist and liberal models, particularly with the rise of partisan media in the United States and a related weakening of journalistic professionalization. That argument makes a lot of sense. But another way to conceptualize what is happening with the U.S. media system is as a change of state within the liberal model itself. Partisanship is not new in the U.S. media system, of course; it was strong in an earlier era. The British system always had significant partisanship in the print press, particularly the tabloid press. We would argue that commercialized media, which is the most distinctive characteristic of the liberal model, is compatible with both high and low levels of political parallelism, depending in part on the political environment (both in terms of regulation and in terms of partisan polarization in political culture), but perhaps most strongly on the structure of media markets. Highly concentrated markets tend to produce nonaligned media, but fragmented markets produce partisan media, as news organizations use political identity to capture market niches. So, we could conceive of shifts in the level of partisanship to be part of the characteristic pattern of variation in a liberal system. This would also help to explain why the shift to partisanship is uneven in the U.S. system, because journalists in most legacy news organizations continue to resist it. Partisanship is characteristic of the particularly fragmented markets of the Internet, radio, and cable TV, but not of broadcast TV and the newspaper industry. This perspective on polarization in the United States would also help to explain why shifts toward the polarized pluralist model are much less pronounced in other domains, such as the role of the state.

I am currently doing work on Latin American media systems, trying to think through whether it is possible to produce a typology that would apply to them. One of the conceptual challenges is certainly the fact that they are less stable, that substantial, sometimes dramatic shifts in relations between media and politics take place more frequently than in Western Europe and North America. To take an extreme example, in the course of a couple of decades, Venezuela shifted from a traditional media system with commercial media closely tied to competing factions of elites to a populist regime with a high level of popular mobilization, a growing role of the state, and a highly polarized media landscape, and then to an authoritarian system. In this context, does it make sense to develop a typology of media systems of the sort Mancini and I created for Western Europe and North America?

Perhaps, it would make sense to develop a typology, but also to conceive of individual cases (i.e., national media systems) not as being stably associated with particular models, but as shifting between models. Or perhaps it would make sense simply to put particularly strong focus on developing media system models that help to explain the recurring shifts that are characteristic of the region, where there is a long

history, for example, of populist leaders rising and falling and of shifts from periods when most media are collusive with the regime in power to periods of conflict and polarization. And, as mentioned above, there are certain kinds of practices, relationships, and institutional structures that tend to persist through these changes.

One thing to remember in carrying out the analysis is that media system models, or whatever conceptual frameworks we create, are simply conceptual tools that help us to make sense in certain ways of what is going on. They are not reality itself, and there is no objective answer, for example, to the question of whether a system has changed into something fundamentally different or not. It is just a question of how we choose to conceptualize it, and whether we can show that this conceptualization is productive.

### **Digital Media and Media System Change**

The rise of new media together with other kinds of social change that have taken place simultaneously—globalization of the economy, for example, and the collapse of old political party systems in much of the West—have produced considerable change recently in media systems. It is worth emphasizing that the processes of change currently under way did not start with the Internet and are not driven in any narrow sense by technology. The rise of partisan media in the United States, for example, started in radio and cable television before the Internet became a medium of public communication. It was rooted in changes in political culture that political scientists generally date to the 1970s, and then was pushed forward by the growth of cable television and the deregulation of broadcasting. Trends toward increased market pressures on news media and blurring of boundaries between news and entertainment, with the consequences these developments carried for journalistic professionalism, were also connected with these same changes (Hallin, 2000). In many parts of the world, the growth of cable and satellite TV and the liberalization of television in the 1980s and '90s had major consequences for both media industries and political communication, whose effects we are still feeling today, as Chakravartty and Roy (2013) illustrate in the case of India. In Europe and in different ways in Latin America, a very important driver of media system change is the collapse of the established political party system, a change in which digital media play a role, but which has its roots much more deeply in the political economy of these regions.

Certainly, however, digital media have become an important force for change; combined with the other factors of change, the shifts to which they have contributed certainly mean we need to think differently in important ways about how to study media and media systems. The first generation of media studies scholarship was focused on the study of institutions and often, more specifically, on organizations. The sociology of news tradition, for example, which had its origins in the 1970s, centered around the study of organizations such as *The New York Times*, the BBC, or *Le Monde*, and how journalists working within these kinds of organizations produced news. Organizations are still important, and today, of course, new kinds of organizations, particularly the tech companies that control the platforms around which digital media are organized, are now central to the structure of media systems. But the decline of the “gatekeeping” role once played by the most central news organizations and the increasingly complex process of production of much news and culture, documented in such works as Anderson (2013) and Chadwick (2013), mean that the focus

of media studies is moving to some extent to networks rather than organizations. The notion of a media ecology has also become more central (e.g., Lowrey, 2012; Raeymaeckers, Deprez, De Vuyst, & De Dobbelaer, 2015), as audiences have become fragmented and the production of news or culture has come to be oriented around niche audiences rather than a mass audience. We are just beginning to figure out how to reorient our scholarship to account for these kinds of changes, what new kinds of variables we need to look at, and how we should conceptualize the new nature of existing media systems that has resulted from this set of changes.

None of this, to my mind, however, makes the concept of system any less relevant. If we think of the ecological metaphor, for example, we should keep in mind that the central concept in the field of ecology is the concept of ecosystem, and systems theory has always been central to ecological thinking. Ecologists too, apparently, faced with the “unprecedented challenge” of a “rapidly deteriorating state of the environment” (Pahl-Wostl, 1995, p. 1), as one recent work puts it, have been debating how their field needs to adapt to conceptualizing new forces of change, moving away from such concepts as the “balance of nature” to more dynamic ones. But this does not mean that they abandon the concept of ecosystem, which plays a key role in understanding how processes of ecological change play out, how a particular change affects the rest of an interconnected system, or how different processes of change interact with one another. In some ways, that concept may become particularly crucial. The same is true, I think, of the concept of media systems.

### **Path Dependence and New Media**

Here, I would like to go back to the idea of path dependence, and make some points about how that concept might apply to the study of new media, as a way of thinking, more broadly, about how new media do and do not disrupt the structure of existing media systems. In a recent article on media system research in the 10 years after *Comparing Media Systems* (Hallin & Mancini, 2017), Mancini and I make the point that there are three ways we might imagine the development of new media relating to the existing structure of media systems. It could be that new media would follow logics independent of the existing differences among media systems, logics rooted in technology or in transnational structures such as the platforms of Facebook or WhatsApp. In this case, we might expect digital media to resemble one another globally more than they resemble other media within national media systems and to be a force for the homogenization of media across national systems.

There is no question that new media do disrupt established relationships and institutions in national media systems in many cases, and that they do this in part by increasing the volume of transnational flows of media content and the importance of transnational institutions, including, very centrally, “tech” platforms such as Facebook and Google. The impact of transnational media institutions within national contexts is not, of course, new; it is another of the changes in global media systems that accelerated before the Internet with satellite television. But the Internet has increased this trend substantially. Here, it is worth stressing that the concept of media systems does not imply that systems are closed and self-contained. If we switch back to the parallel of ecosystems, a pond or meadow can be analyzed as an ecosystem, but it is in turn nested within larger ecosystems, a watershed, for example, or ultimately the global ecosystem. The same is true of media systems, and the extent and

the ways in which particular national media systems are affected by global flows and structures may be important variables by which we might characterize different media systems, as well as analyze changes in them over time. As other contributions to this special issue demonstrate, the Internet in China is structurally distinct from the Internet in many other systems, something that is possible in part because of China's large internal market and strong state. The European Union has the capacity to impose regulations on tech platforms that countries in Latin America or Africa do not.

Another possibility in thinking about the relation of new media to existing media systems is that we might expect new media to develop differently in different media systems, following the existing patterns in those systems: to be partisan, for example, in systems with high degrees of political parallelism and less so in systems with lower degrees, or similarly to follow patterns of professionalism in different systems. This would be one form of path dependence, a form that would lead us to expect significant continuity in media systems over time and a continuing relevance of national differences. Finally, a third possibility is that we could imagine that new media would develop differently in different media systems, not in ways that are continuous with existing patterns, but in ways that are contrary to them. The idea here, using the media ecology perspective, is that new media might develop to fill niches that were not filled by the institutions of the existing media system. This would also be a form of path dependence given that it would mean that the new media are shaped by the historical evolution of the media system. But it would be a different form of path dependence than the form that involved existing patterns being replicated in new media.

We argued in Hallin and Mancini (2017) that the existing research suggests that all three of these patterns exist in different situations, and subsequent research seems to confirm that conclusion. One recent example is a study by Christin (2018) that looked at net native news media in the United States and France and at the ways in which journalists related to the new forms of audience measurement made possible by digital media. She shows that the technology was diffused from the United States to France; in that way, there is a technological logic that shapes journalism across media systems. Yet, she also shows that U.S. and French journalists do not use and are not affected by this technology in the same ways. In the United States, where there is a tradition of separation of the business and journalistic sides of the news organizations, journalists tend to see the use of the technology as the responsibility of the top editors and no concern of theirs. In France, where that separation is weaker, they tend to pay much more attention to the numbers and to feel great anxiety over the contradictions in their role that the new technology produces. Here, existing patterns are in an important way reproduced. Powers and Vera-Zambrano (2016), in another comparison of the United States and France, show that journalists in the United States were more successful than those in France in creating new media start-ups, a difference they trace to various system characteristics, including the nature of labor regulation and its effect on the job security of senior journalists. This suggests elements of continuity and greater commercialization of media in the United States, but also perhaps system-level factors that would produce a faster pace of change in the United States.

One growing body of literature has explored cross-national differences in the ways in which audiences access and use news in different media systems, an important focus of research as the media ecology has become more complex (e.g., Hölzig, Nielsen, & Schroder, 2016; Perusko, Vozab, & Cuvalo,



2015). One important finding of this research is that in systems—mainly in northern Europe—where legacy media institutions are historically strong, those legacy media tend to dominate online, whereas in systems where they are weaker, net native media are relatively stronger, suggesting that new media may develop to fill niches not filled within existing media systems. The existing research focuses mainly on Europe, but would probably apply, among other regions, to Latin America, where existing media tend to be dependent on the state and on elites with political ties—a pattern that has in some ways increased with the economic marginality of legacy media—and journalists who want to practice some form of independent journalism move into digital media.

### **Concluding Thoughts on Methodology and the Complexity of Media Systems**

With the rise of digital media, combined with other changes in social and political systems in many parts of the world, we have entered a period when many media systems are changing rapidly, becoming both more complex and more fluid. These changes, in many cases, can be traced back decades to periods before the Internet, and it is important to keep in mind that media systems have always existed in a process of change and development. Nevertheless, in the current period it is clearly a priority to think through how to conceptualize both change and complexity in media systems. This should not, in my view, prompt us to abandon the concept of media systems, which seems to me essential to conceptualizing the processes of change now underway.

This leads me to some concluding thoughts about methodology in the comparative analysis of media systems. *Comparing Media Systems* was a synthetic work in the tradition of the historical-institutional approach to comparative analysis. It drew on a wide range of different kinds of studies, using different kinds of methodology, and tried to create a synthesis that would understand distinct media systems as irreducible wholes in the sense that Laszlo and other systems theorists use the term. Since our book came out, there has been an enormous upsurge in comparative research. The bulk of the work, however, has taken a different path methodologically toward quantitative research, often involving relatively large numbers of cases. Why this is true is an interesting question; I suspect it is related to the changing political economy of academia especially in Europe, with strong incentives for regular publication of journal articles. Much of this research is excellent, of course, and has made outstanding contributions. But the imbalance in the field and the lack of a stronger tradition of more contextualized case studies and of synthetic historical-institutional work seem to me a problem that takes on particular importance given the increased complexity of media systems and the increased pace of change. Often, quantitative comparative analysis is based on an implicit assumption that a media system should be able to be summarized by a single aggregate number on any given variable. But, of course, given the dynamism and complexity of systems, that is a dubious assumption. A quantitative study, even if it appears on the surface to be very general and not tied to a context, is almost always tied to a particular moment in time when the data were gathered, to particular contexts, to particular operationalizations of key concepts, and to particular samples. In the era when journalism was dominated by a small number of centralized media, a study of these centralized media could be considered as representing the system as a whole in some sense.

Today, no single study can do this. Any single study is likely either not to be generalizable to the functioning of the system as a whole, or so aggregated as to miss the specific patterns of variation that make the system what it actually is. The practice of abstracting from particular contexts, which is more necessary the more cases a study covers, makes it impossible for the researcher to analyze how the results of the study fit into this pattern of a whole system with diverse interacting parts and varying patterns of relationship among them. To the extent that we face a reality today in which media systems are indeed more dynamic and more complex, we will no doubt need to be more modest in the claims we make for particular studies, take more time to reflect on the way the particular contexts of our studies shape their results, and be more patient to wait until there are enough studies in different contexts with different methodologies, that we can begin to sort out the meaningful patterns. And it seems to me that there will be a need for more, not less, reflection on how to theorize the changing nature of media systems as interdependent, interacting wholes.

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