MAPPING DIGITAL MEDIA:
ON-DEMAND SERVICES AND MEDIA DIVERSITY

By Laure Kaltenbach and Alexandre Joux

OPEN SOCIETY
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On-demand Services and Media Diversity

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On-demand services give access by internet (or cable) to video, audio and other content. A vast range of on-demand media products is now available.

Media corporations no longer monopolize the routes by which content comes to thrive in the on-demand world. Social networks, YouTube, and word of mouth all play their part. While content creators saw their market share rise between 2000 and 2009 from 12 percent to 13 percent of the total, the publishers' share fell from 71 percent to 48 percent and the distributors' share rose from 17 percent to 39 percent.

The new pairing of high-tech gadgets with internet services is becoming the gateway to content on demand. The "broadcasters" on the internet—Apple, Sony, Amazon, and so on—are both device manufacturers and online service providers. The content available via their platforms will draw in the consumers of on-demand media. The influence of on-demand services is likely to increase as internet-connected television sets become more common.

Online services are all about technical competence, not social responsibility. They leave internet users to decide what deserves to be read, viewed, and heard. This freedom is exercised in the context of heavily personalized catalogs, reflecting users' wishes and histories.

As well as furthering the exploitation of "tribal" consumer niches, however, on-demand services have the potential to help people discover what they don't already know. If this potential is to be realized, "sociability" will have to become "conviviality"—and the providers may have to accept public service obligations of some kind.

Mapping Digital Media

The values that underpin good journalism, the need of citizens for reliable and abundant information, and the importance of such information for a healthy society and a robust democracy: these are perennial, and provide compass-bearings for anyone trying to make sense of current changes across the media landscape.

The standards in the profession are in the process of being set. Most of the effects on journalism imposed by new technology are shaped in the most developed societies, but these changes are equally influencing the media in less developed societies.

The Media Program of the Open Society Foundations has seen how changes and continuity affect the media in different places, redefining the way they can operate sustainably while staying true to values of pluralism and diversity, transparency and accountability, editorial independence, freedom of expression and information, public service, and high professional standards.

The **Mapping Digital Media** project, which examines these changes in-depth, aims to build bridges between researchers and policy-makers, activists, academics and standard-setters across the world.

The project assesses, in the light of these values, the global opportunities and risks that are created for media by the following developments:

- the switchover from analog broadcasting to digital broadcasting
- growth of new media platforms as sources of news
- convergence of traditional broadcasting with telecommunications.

As part of this endeavor, the Open Society Media Program has commissioned introductory papers on a range of issues, topics, policies and technologies that are important for understanding these processes. Each paper in the **Reference Series** is authored by a recognised expert, academic or experienced activist, and is written with as little jargon as the subject permits.

The reference series accompanies reports into the impact of digitization in 60 countries across the world. Produced by local researchers and partner organizations in each country, these reports examine how these changes affect the core democratic service that any media system should provide – news about political, economic and social affairs. Cumulatively, these reports will provide a much-needed resource on the democratic role of digital media.

The **Mapping Digital Media** project builds policy capacity in countries where this is less developed, encouraging stakeholders to participate and influence change. At the same time, this research creates a knowledge base, laying foundations for advocacy work, building capacity and enhancing debate.

The **Mapping Digital Media** is a project of the Open Society Media Program, in collaboration with the Open Society Information Program.

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I. Introduction: What Are On-demand Services?

On-demand services allow access through an internet or cable connection to video, audio, and other artistic works and creative content at the individual request of a client or user by means of an electronic communications network. This request represents the user's or client's consent. As such, it can be considered a contractual act: the demand is an essential element that gives specificity to online services.

Creating a Facebook account and accepting the use of one's personal data as a condition; downloading a movie from Netflix; buying an e-book from the AppStore: these actions depend on a specific request from the internet user. For the media, on-demand services deliver content on demand, especially video on demand. In the United Kingdom, the regulator Ofcom emphasizes user choice, expressed by the individual request: "Video on Demand (VoD) is a service or a technology that enables television viewers to watch programmes or films etc. whenever they choose, rather than being restricted to a linear schedule."[2] This paper treats VoD as the main on-demand service in a field where new services such as sharing websites and social networks enhance the diffusion of video on demand and other contents too (such as information, books, and music).

It is easy to forget just how new this all is. Audiovisual communication was dominated throughout the twentieth century by broadcasting. In this context, the idea of on-demand media was almost non-existent, since on-demand involves a specific request by a specific person at a specific point in time, while broadcasting consists in pushing content to masses of people with a schedule predetermined by the media.

At the end of the last century, however, the evolution of television, in particular the advent of cable television, allowed for the introduction of on-demand services, since individual members of the audience could now request audiovisual material of their choice whenever they wished. This possibility broke the linear nature or flow of broadcasting, and meant to a certain extent a regression to the world of the cultural industries, which

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2. See Ofcom, "The regulation of video on demand services," 18 December 2009, available at http://stakeholders.ofcom.org.uk/binaries/consultations/vod/statement/vodstatement.pdf.

are based on the idea of inscribing information in a container in the form of a discrete product that people can request at any time—in this sense, a library or a jukebox are on-demand media.

But on-demand services have only shown their full potential in the transition in the past decade, and thanks to the internet, which is by architecture and design a fundamentally on-demand medium with almost endless storage capacity. In the online realm fragmentation, unbundling, and non-linearity have come to replace the integrity of works, editorial decisions, and programming. This affects all industries and forms of communication. Music albums, newspapers, or television schedules are torn apart into songs, news items, and programs to be consumed anytime, anywhere—time-shifting and mobility are sovereign—and can even be further fragmented into snippets that put into question the authors' rights to the integrity of their works.

The role of audiences also changes. We are able to choose from an almost infinite array of communicative products, which we can not only consume, but also recommend and circulate—making them "viral". But greater prominence for audiences does not make the intermediaries irrelevant. Even though there are endless cultural products to choose from, and the media industry seems to have lost much of its editorializing and scheduling power, the 'long tail' still seems marginal.[3] For most media consumption concentrates on a limited number of products, made and promoted by well-known brands.

In addition, new intermediaries appear. They are aggregators, filters, gadget manufacturers, and online service providers—at times all of these at once—which shape, condition and limit users' choices. As a result, the new world of on-demand services brings its own burdens and dangers, creating a difficult balance between freedom and social responsibility, between tribal niches and the exposure to diversity necessary for social life.

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3. A 'long tail' retail strategy uses online commerce to sell a great range of unique items in small individual quantities, over a long period. See Chris Anderson, *The Long Tail: Why the Future of Business is Selling Less of More*. New York, NY: Hyperion, 2006.

II. Content and Consumption

A diverse range of on-demand media products is available. The most recent report by the European Audiovisual Observatory on video on-demand and catch-up television estimated that there were 642 on-demand audiovisual service providers available in the 27 European countries reviewed.[4] Whether there is diversity in consumption is another matter. In the case of on-demand media services, where the user can choose from a catalog of programs selected by the provider, consumption tends to be concentrated on a limited amount of content.

For example, which artist was the most frequently downloaded from online music platforms in 2009? Lady Gaga's *Poker Face* video with 9.8 million downloads on YouTube.[5] The most downloaded film from iTunes? *Twilight.*[6] The leading television series in on-demand video consumption? *Mad Men*, *Lost*, *24*, *Grey's Anatomy*...

Whether accessed on-demand or via broadcast television channels, the blockbusters are the same. While on-demand media services mean that consumers no longer need to rely on the editorial decisions of media corporations, the fact remains that consumer choices tend to correspond with those of the mainstream media corporations. This raises the question of whether the options offered by on-demand services are really making a difference to consumption. Do they enable a "long tail" effect to emerge, allowing less commercial products to remain continuously available? Do they give rise to a diverse and disparate consumption which has a place for new entrants and independent productions? The evidence to date suggests not, as recently reaffirmed by Anita Elberse, who invokes the Pareto principle (or the 80–20 rule): 80 percent of the sales depends on 20 percent of the products commercialized, a situation that reflects the power of mass media and the focus of marketing investments on a few bestselling products.[7]

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4. European Audiovisual Observatory, *Television and on-demand audiovisual services in Europe. Yearbook 2011*, Vol. 2*,* Strasbourg, 2011.

5. Marie-Catherine Beuth, "Musique : l'offre numérique se structure," *Le Figaro*, 22 January 2010.

6. See http://itunes.apple.com/us, 4 March 2009.

7. Anita Elberse, "Should You Invest in the Long Tail?," *Harvard Business Review* 86, nos. 7/8 (July–August 2008), pp. 88–96.

Of course, the very possibility of choosing what to watch undermines the position of broadcasters which was based historically on their editorial choices and their branding. It is not HBO that gets downloaded but rather the series which HBO produces.[8] The brand, its identification by the consumer, has shifted away from the broadcaster and towards the content, although not entirely so. Consider the Lady Gaga, *Lost* or *Desperate Housewives* brands. For the particular content associated with these brands to become part of the sphere of reference of internet users, it must first become part of the media world and make its mark there, in one way or another. Only then will users request it online as and when they want it. The brand of the media corporations and their investments in marketing to promote creative contents give visibility to a film, a singer, a book that is then remade as a new brand for internet users. The two brands remain linked, as Olivier Bomsel has shown.[9]

This, then, is the pattern: broadcasting services promote content which subsequently acquires a life of its own, separate from the broadcaster, in the world of on-demand content. Certainly, the role of broadcasters is still key in creating music, film, and audiovisual blockbusters. Meanwhile, other channels are emerging which enable artists to gain recognition without the initial support of big broadcasters, even if we can consider this phenomenon as an exception. Playing for Change, an artists' collective, first became known through YouTube, with more than 20 million hits to date, repeats of the documentary about the artists on US television and the backing of the largest of the "Big Four" music companies, Universal Music Group. Word of mouth and social networks played their part in this story. In these circumstances, media and communication corporations enlarge the celebrity of self-made artists. The British singer Lily Allen created her profile on MySpace in 2005, gaining thousands of followers before she became a star thanks to a cover feature in the *Observer* newspaper's Music Monthly magazine in 2006.

From this perspective, there are numerous overlaps between on-demand media consumption and non-media related online services, in addition to the numerous interactive and recommendation services such as social networks and video-sharing sites. Recommendations, or "going viral," can lead to new forms of consumption. In this case, it is the community of users that takes on the role of broadcaster, not the media provider. In fact, the mass media, through the imposition of their editorial choices, routinely used to bring content to the public's attention which the public would not necessarily have asked for. That was how the broadcast model operated. By contrast, we now have new tools to create awareness and popularity—and promote diversity.

The role of the technical players, such as Apple, Sony or Amazon with its Kindle, is significant here. They complement their range of communications devices with a kaleidoscope of services. In the end, it is the law of strength in numbers, backed by an array of wares, which allows individuals to define what Edgar Morin called

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8. HBO, or Home Box Office, is a U.S. cable television network, owned by Time Warner and responsible for producing many of the most prestigious American television productions of the past decade and more.

9. Olivier Bomsel, "Copyright and brands in the digital age. Internalizing the externalities of meaning," paper given at Serciac, Cartagena, 9 July 2010, to be published in *Contemporary Economic Policy*, 2011; available at http://www.serci.org/2010/bomsel.pdf, and in French at http://www.cerna.ensmp.fr/images/stories/media/CEP_OB.pdf.

"the spirit of the age."[10] At the same time, we are seeing creators and suppliers lose a part of their control over the promotion of their products. With a clever marketing strategy, however, creators can redress the balance to some extent. In France, for example, the site MyMajorCompany.com lets internet users subsidize new artists, which is a good way to create a community of internet users, while independent producers promote the artists launched by MyMajorCompany all around the web.

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10.   Edgar Morin, *L'Esprit du temps*, Grasset, Paris, 1962, p. 249.

III. Cultural Diversity and Regulation of On-demand Services

Cultural diversity presupposes the existence of plurality and diverse expression in the choices available. However, to have any real meaning, cultural diversity must also involve diversity in consumption. European Union regulation tries to address this diversity in choices and has included, since 2007, on-demand services in its audiovisual strategy.

In the world of audiovisual media, the EU definition of online services is based on the difference between linear and non-linear services. This was defined when the 1989 Television Without Frontiers (TWF) Directive[11] was revised in 2007 as the Audiovisual Media Services (AVMS) Directive.[12] While the TWF Directive dealt exclusively with broadcasting services, known as linear or point-multi-point, the AVMS Directive includes so-called non-linear, on-demand or point-to-point services.

The inclusion of on-demand media services in the AVMS Directive is significant. This is because the cultural specificity exemption, negotiated in the 1994 General Agreement on Tariffs and Trade (GATT) agreement, only applies to linear services.[13] In 1994, "broadcasting" was the prevailing audiovisual language. The subsequent development of the internet and the growth of on-demand consumption have been considered as offering ways to bypass the TWF directive. However, with the 2007 Directive, on-demand media services can now be subject to regulation for the protection and promotion of cultural diversity. Broadening the scope of the directive in this way means that different national regulators can require service providers to meet standards of pluralism and diversity in the range of products they offer. Additionally, they can impose funding requirements for audiovisual and cinematographic production.

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11. The Television Without Frontiers Directive (Council Directive 89/552/EEC of 3 October 1989). See http://europa.eu/legislation_summaries/audiovisual_and_media/l24101_en.htm

12. The Audiovisual Media Services Directive (Directive 2007/65/EC of the European Parliament and of the Council of 11 December 2007). See http://europa.eu/legislation_summaries/audiovisual_and_media/l24101a_en.htm

13. This exemption, introduced to the GATT at France's behest, allows states to maintain tariffs and quotas which protect their domestic cultural markets. The right to implement such exemptions was confirmed by the UNESCO Convention on the Protection and Promotion of the Diversity of Cultural Expressions (2005).

The next step for regulation would probably be to include in its playing field all the services that are now considered as non-audiovisual but that rely on contents, such as YouTube for videos and news aggregators for information. These services, known generally as aggregators, are the new tools that help internet users to access creative content and might be categorized as "content service editors." They are not strictly editors or media services in the AVMS Directive's terms, but they cannot be considered as simple technical services without responsibilities in the cultural or entertainment field.

Beyond services regulation, some other legal questions are already emerging from new technologies and new on-demand offers. First are the question of integrity and its counterpart, the fragmentation of artistic works. There are two branches of copyright which give authors certain rights with regard to any original works they have created: moral rights (covering ownership and integrity of the work); and property rights (concerning revenue from royalties over a given period). In the case of the integrity of artistic works, for books this means publishing the text only in its entirety; for films or music, similarly, it means broadcasting the complete work without carving it into highlights, best tunes, best lines, best scenes, and so forth. Extracts and quotations are subject to strict regulation.

What does this mean for on-demand services? Naturally the law must be applied. The internet is not a lawless territory, far from it. However, this is not exclusively a legal matter. It is a question of making a cultural asset available and identifying a model for recompensing the author. The first example is the university textbook. Which students today would buy the "bibles" recommended by their lecturers at prices which, frankly, are way beyond the means of students? Today, they are not prepared to pay more than €10 for a book. The result is that photocopying entire chapters has become the norm.[14] Wouldn't an on-demand service offering chapters online for a few euros be more economical than photocopying?

The second example is the cinema. Is it possible to slaughter the sacred cow? Can the "best of" treatment be applied to masterpieces, cult movies or the latest cartoon giving us just the funniest scenes? Or the most tragic, the most powerful, the most heart-wrenching, the most moving? Must we consign monumental works of cinema to oblivion just because, today, after some 90 versions of the life of Joan of Arc which have been made over the years, only those by Luc Besson and Robert Bresson are remembered, having eclipsed those of Cecil B. De Mille, Dreyer, and Otto Preminger? Or rather, in a world which no longer has time to contemplate its cinematic heritage from the late 19th and early 20th centuries, even if it is the restored version, should we permit the viewing of extracts of artistic works?

In September 2011, for the launch of the *Star Wars* saga in Blu-ray, Georges Lucas made some changes to his movies, often minor, but unacceptable even so to fans, the real guardians of the integrity of the work. But most artists, movie-makers, writers, and painters fight to preserve the integrity of their work, especially when the purpose of the cuts is exclusively commercial. The opposite has occurred with music. For decades, the market

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14. Interview with Christian de Boissieu for the Forum d'Avignon 2010, available at http://www.forum-avignon.org/newsletters/NewsLetter_07_2010_FR.html.

was monopolized by albums with 12 tracks. Then, unbundling arose spontaneously among consumers, with consequences that are well known. Certainly, the fragmentation of artistic works cannot happen without the endorsement of the authors or rights-holders. Indeed, there is no direct link between moral rights and the economic aspects of intellectual property rights. The question must be opened, calmly, for debate.

The second question concerns access. The issue of the digital divide and access often leads to stereotypes of paired opposites: young versus old, ancient versus modern, North versus South, East versus West. In the case of on-demand services, it is less a matter of opposites, which clearly need specific responses, than of what we want, or what is available to us, as content. On-demand services allow, in theory, access to any content, anywhere, and in any format.

In reality, on-demand services reflect the catalogs of publishers, creators, broadcasters, VoD platforms, partnership agreements signed by stakeholders, etc. It only remains to define a framework for promoting diverse content created by artists and authors who may not be known to the wider public. In this respect, the public service role in promoting independent works is a matter for serious consideration. The EU and its member states are working on this question to foster a genuine diversity of content.[15]

The third and last question concerns the added value of on-demand services. A study by the Atelier BNP Paribas, published in November 2010, asks some direct questions about user expectations with regard to this added value.[16] The study describes the dematerialization and re-materialization of content, in the way that a piece of music dematerializes from the computer and re-materializes on an iPod, or a book dematerializes from its text file format and re-materializes on a tablet or reader. "Each new generation of technologies gives birth to its batch of innovations which follow this double process of de-materialization and re-materialization and generally increase the usage value of objects."

In this respect, the new pairing of "high-tech gadgets plus internet services" is becoming established as the gateway to content on demand. This new pairing not only encourages access but also enriches the experience of the public with new technologies. Little by little, users are taking ownership of these technologies: enhanced reality, internet-connected television, internet-connected games consoles, touch-screens and interactive interfaces, robots, and so forth.

All these technologies are deeply impacting the value chain between editors and media, internet service providers and telecommunications' operators. Apple, Google and Sony will probably be at the heart of tomorrow's media world, even if their activity is not directly linked to creative content. Thus, they will also be at the heart of future regulation.

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15. See http://www.ddm.gouv.fr/rubrique.php3?id_rubrique=94.

16. *Impact des nouvelles technologies numériques sur le monde de la culture* (Impact of new digital technologies on the world of culture), A Study by Atelier BNP-Paribas for the Forum d'Avignon 2010, available at http://www.forum-avignon.org/en/edition-2010/publications#601. The Forum d'Avignon is an international forum on culture, the economy and media: see www.forum-avignon.org.

IV. On-demand Services and Business Stakes for Editors, Telecommunications, and Web Services

In the analog world, media corporations and creators had found their place in a stable ecosystem where broadcasters funded themselves through advertising and subscriptions which, in turn, enabled them to buy their content from the creators. With the emergence of digital and online services, cracks appeared in this ecosystem. Online service providers became the new vital link in a value chain threatened by piracy. As such, between 2000 and 2009, the share of media corporations' profits derived from the internet rose from 4 percent to 22 percent of total profits.[17]

At the same time, the value chain which links creators and distributors, taking in online service suppliers, has altered significantly. Funding from advertising has fallen, to be replaced by revenue from subscriptions or one-off purchases. The figures speak for themselves. While content creators saw their market share rise from 12 percent to 13 percent of the total, the publishers' share fell from 71 percent to 48 percent while the distributors' share rose from 17 percent to 39 percent.[18] In this way, content-related services became the principal source of added value.

The market for digital music has been defined by iTunes which has sold over 10 billion tracks since the platform was launched in 2003. Since 2008, iTunes has been the leading music distributor in the United States, regardless of format, ahead of Wal-Mart and Amazon. In the e-book market, Amazon currently defines the market for on-demand media services with its Kindle application.

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17. "Getting out of the recession : a new innovation model for the cultural economy?", Bain & Co. for the Forum d'Avignon 2009, available at http://www.forum-avignon.org/sites/default/files/editeur/Etude_Forum_Avignon_BAIN_CO.pdf

18. Ibid.

Lastly, in the market for pay-per-view VOD, it is Apple that is rapidly taking over. In 2010, Apple's iTunes movie service accounted for more than two-thirds of US VoD consumer spending, far ahead of Microsoft and its Xbox, which has a market share of only 17.9 percent.[19]

Apple is still implementing its business model in its new connectivity devices, the smartphone and multi-function iPad. By making its AppStore the key to the added value of both the iPhone and iPad, Apple has prioritized the software level, the essential service 'middleman' between the connected device and the range of content. The 'broadcasters' on the internet are now both device manufacturers and online service providers! By the logic of this convergence, the content available via their platforms will draw in the consumers of on-demand media.

The increasing influence of on-demand services is likely to be consolidated as internet-connected television sets become more common. Television, which remains the focus of shared experience in the home, will also become personalized and join the age of on-demand consumption. In September 2010, Apple announced that it was lowering the price of its Apple TV and had reached agreements with ABC and Fox regarding its range of on-demand video, thus transforming the television set into an interactive program catalogue. Google is also planning to launch its VOD service and will soon control television set-top boxes in the United States after buying Motorola Mobility. The deadly weapon in Google's armory is YouTube, the video-sharing service which achieves 2 billion daily viewings, which it will certainly use to promote its products on internet-connected televisions.

Lastly, manufacturers such as Samsung are already hailing a new era for television which, from connected, will evolve to become 'intelligent'. Like the telephone, which became the 'smartphone' and was thus transformed into a pocket computer essentially delivering on-demand services, the television set is certain to be transformed into an interactive device with the role of broadcasters steadily giving way to the new, personalized applications. This is also the strategy of Yahoo! which offers a world of content, adapted to suit each user profile, with its Yahoo! Connected TV service.

Following agreements with Samsung, LG and Sony, this was installed in around three million television sets at the beginning of 2010. Sony continues to develop the same strategy with the launch of its Qriocity service based on its PlayStation network. The service covers Sony's Bravia brand of internet-connected televisions and its VAIO range of laptop computers. A community ecosystem is thus expected to emerge in which individual users could get priority exposure to preselected Sony content, according to their relationships on the network and their preferences.[20]

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19. According to Screen Digest. See Arash Amel, "Apple iTunes Remains Dominant in U.S. Online Movies in 2010, Despite Competitors' Inroads," Press Realse iSuppli – Screen Digest, 7 February 2011, available at http://www.isuppli.com/media-research/news/pages/apple-itunes-remains-dominant-in-us-online-movies-in-2010-despite-competitors-inroads.aspx

20. Sony owns Columbia Studios and Sony Music, one of the Big Four record labels.

V. The Paradox of On-demand Services: "Tribes" or Universality in an Era of Personalization?

While individuals are becoming *actors* in terms of consumption, they are not necessarily *masters* of it. The filters change and the power to make a real difference is actually in the hands of the intermediaries. While a traditional managing editor or director of programming could be said to have a certain social responsibility, online services are all about technical competence. They leave to internet users the responsibility of deciding, through their selections and their collective behaviour, what deserves to be read, viewed and heard. This individual consumer participation is a double-edged sword. By focusing on blockbusters, consumer participation is limited to a kind of "window shopping" exercise, exposing each user to a globalized culture in which she or he plays no active part.

Conversely, by exploring the far reaches of the catalogues, the infinite richness of content placed online, unlimited in time and space, user participation becomes a vehicle for unprecedented enrichment in terms of cultural consumption and, thus, a means of truly realising the aims of cultural diversity. From this perspective, the future role of on-demand service providers is crucial. Perhaps, once they have tipped the balance in the value chain, it will be necessary to ask them to accept some of the responsibilities which previously belonged largely to public service broadcasters.

In sum, on-demand media services meet the wishes of users to project themselves into a universe forged in their own image, reflecting their tribal allegiances, their rules and their points of reference. On-demand services have that particular quality of speaking to the personal, to individual cultural identity. Why are 'best of' compilations so successful? On what basis is the collective imagination constructed when a Facebook group is formed? In what way is recognition among internet users reassuring? Certainly, this phenomenon appeals to that tribal instinct of coming together around shared values. And these values naturally center around common points of interest shaped by on-demand services: brands, books, music, stars, films, television series, etc.

The value of mass media relies on the community experience. Internet users organize their own communities of consumption on the web, but without the media and their social dimension. This is the power of what we call— paradoxically—"social" networks, which are more truly "tribal" networks. The personalization enabled by on-demand services tends to create specific communities of interests, not necessarily a better understanding of others or a keener curiosity. In this context, the long tail could be considered as the economic exploitation of tribal "niches" rather than an opportunity to discover what is still unknown—André Malraux's dream of a museum without walls.

To escape this paradox between tribes and universality, "sociability" has to become "conviviality", meaning the capacity to accept radical differences of "the Other", to welcome real differences, to search for new contents, new ideas, new experiences, new people that are not already identified in our personal world of references.

V. Conclusions

The question about diversity of consumption will decide how we manage our contents in the coming decades. Are we moving towards a "tribal" world, with consumption based around shared interests? In that case, with each tribe consuming only what a niche-platform offers them, cultural diversity would not really exist.

Some other community platforms, federating different niches—but in the same universe, where it is possible to transgress the boundaries of your own interest—will probably give rise to new, more diverse forms of media consumption facilitated by the availability, on-demand, of a limitless amount of content.

The real level of cultural diversity will depend on the way we consume content. It will also depend on the on-demand services and the media regulation. If regulation keeps focusing on the media, the technical players and internet services like Apple, Amazon, YouTube, Netflix, and tomorrow Facebook will keep promoting the personalization of services without developing an editorialized approach to enhance the diversity of consumption of contents.

As of today, internet services, broadcasters or telecommunication operators are managed separately by the regulators, in the United States as well as in the European Union. Meanwhile, these different actors act increasingly as partners on the internet. Can internet users—or citizens—bet on the *accountability* of these actors? Or will we need a regulation to preserve access to real content diversity as distinct from a limited selection of blockbusters, or niche markets? Unless the answer to that last question is a confident 'never,' we should start to imagine general interest obligations for private actors when they play a major role in the audiovisual sector.

Further Reading

Bain & Cie for the 2011 Forum d'Avignon: Connected devices and services: reinventing content – link here

Bain & Cie for the 2010 Forum d'Avignon: Publishing in the digital era – link here

Ernst & Young for the 2011 Forum d'Avignon: Intellectual property in a digital world – link here

Ernst & Young for the 2010 Forum d'Avignon: Monetizing digital media and culture: creating value that consumers will buy – link here

L'Atelier BNP Paribas for the 2011 Forum d'Avignon: Referencing cultural content on the internet, prescribing culture? – link here

L'Atelier BNP Paribas for the 2010 Forum d'Avignon: The impact of digital technology on the world of culture and the media – link here

Mediawatch – Eric Scherer

Media et Société – Francis Balle – Montchrestien 15ème édition, Paris 2011

Connected TV – CSA – Actes du colloque sur les téléviseurs connectés / Musée du quai Branly, Paris, Jeudi 28 avril 2011, 95 pages, available at http://www.csa.fr/upload/publication/COLLOQUE_tvconnectes.pdf

The MDM Reference Series papers published so far, and available on **www.mediapolicy.org** and **www.soros.org**, are:

1. *Online Media and Defamation*—Toby Mendel

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7. *Net Neutrality and the Media*—Stefaan Verhulst

8. *Gatekeeping in the Digital Age*—Peter Looms

9. *Technical Standards in Terrestrial Television*—David Wood

10. *The Digital Dividend*—Gérard Pogorel

11. *How Television Went Digital in the Netherlands*—Nico van Eijk and Bart van der Sloot

12. *The Media and Liability for Content on the Internet*—Cynthia Wong and James X. Dempsey

13. *Case Study: German Public Service Broadcasting and Online Activity*—Johannes Weberling

14. *Online Advertising: Origins, Evolution, and Impact on Privacy*—Fernando Bermejo

15. *Social Media and News*—Paul Bradshaw

16. *Digital Media, Conflict and Diasporas in the Horn of Africa*—Iginio Gagliardone and Nicole Stremlau

17. *Digital Television, the Public Interest, and European Regulation*—Petros Iosifidis

Mapping Digital Media is a project of the **Open Society Media Program** and the **Open Society Information Program.**

Open Society Media Program

The Media Program works globally to support independent and professional media as crucial players for informing citizens and allowing for their democratic participation in debate. The program provides operational and developmental support to independent media outlets and networks around the world, proposes engaging media policies, and engages in efforts towards improving media laws and creating an enabling legal environment for good, brave and enterprising journalism to flourish. In order to promote transparency and accountability, and tackle issues of organized crime and corruption the Program also fosters quality investigative journalism.

Open Society Information Program

The Open Society Information Program works to increase public access to knowledge, facilitate civil society communication, and protect civil liberties and the freedom to communicate in the digital environment. The Program pays particular attention to the information needs of disadvantaged groups and people in less developed parts of the world. The Program also uses new tools and techniques to empower civil society groups in their various international, national, and local efforts to promote open society.

Open Society Foundations

The Open Society Foundations work to build vibrant and tolerant democracies whose governments are accountable to their citizens. Working with local communities in more than 70 countries, the Open Society Foundations support justice and human rights, freedom of expression, and access to public health and education.

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