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# Introduction

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In writing *Comparing Media Systems*, we deliberately decided to focus on a limited number of similar cases: eighteen nations of Western Europe and North America that by global standards had relatively similar histories as advanced capitalist democracies. As we argued in that book, we wanted to avoid the kind of universalizing approach to comparative analysis in media studies – symbolized by Siebert, Peterson, and Schramm's *Four Theories of the Press* (1956) – that we believed had held back the field for many decades, producing superficial analyses not based in detailed research on particular media systems and often riddled with ethnocentric assumptions. We focused on Western systems not because we thought they were inherently more important than others, nor because we thought they were a natural reference point for comparative analysis, but simply because they were the systems we knew best, and because we knew that there was substantial research available on all of them in languages we could read, enough to make a comparative synthesis possible. Of course, both of these factors reflect the longstanding dominance of the West in global academia. We also believed that because these countries had long been the principal reference points for comparative analysis of media systems – and in general for public discourse about media systems – there would be a great deal of value in subjecting them to more concrete comparative analysis. One of the objectives that we hoped our analysis would accomplish was to demystify the notion of a "Western media model" to some degree, both by showing that there is not in fact a unitary "Western model," because media systems in the Western world have developed according to several distinct patterns, and by treating

these systems not as abstract ideals but as concrete social formations that developed under particular historical conditions.

As soon as the book came out, widespread discussion began about how our framework might apply to the rest of the world. Some criticized us for confining our analysis to a narrow range of countries; many asked us, "How does my country fit into your three models?" or "How does your framework apply to the part of the world that I am studying?" These questions were obviously gratifying, but they made us uncomfortable at the same time. We began to worry that instead of putting *Four Theories of the Press* to rest, our book might *become* the new *Four Theories of the Press*, with our three models turning into a kind of universal schema to be applied almost everywhere. We had many conversations with colleagues about these kinds of questions and eventually decided to confront the issues head-on by launching this book project. We began by inviting a group of scholars who studied media systems outside Western Europe and North America to a conference in Perugia in 2007; because the initial conversations seemed fruitful, we then organized another conference in San Diego in 2009, as well as three panels at meetings of the International Communication Association. We tried to enlarge the range of cases as much as we could and to make sure a wide range of world regions – Eastern Europe and the former Soviet Union, the Middle East, Asia, Africa, and Latin America – were represented. However, we did not attempt a systematic selection of cases. Instead, we recruited scholars we had met in a variety of academic settings, many of whom we knew had been reflecting in some way on how to think about the systems or processes they were studying in relation to *Comparing Media Systems*. Obviously the range of cases presented here does not represent an exhaustive or systematic typology of world media systems. For instance, it excludes the case of India, the world's biggest democracy and one of the few news media systems that has been growing in recent years; at the same time it deals mostly with large and relatively rich countries like China, Brazil, Russia, Poland, and South Africa. We emphasize that this volume should not be conceived of as a kind of "Handbook of World Models of Journalism."

In preparing these chapters, we asked participants to address the question of whether and in what ways the three models of our analysis – which we call the Mediterranean or Polarized Pluralist, the North/Central European or Democratic Corporatist, and the North Atlantic or Liberal models – might illuminate the case or cases they studied, while discussing both how those models did and did not fit those cases. We asked them to consider the four dimensions we use to compare the cases in our

analysis – the structure of media markets, the degree and form of political parallelism, journalistic professionalism, and the role of the state – and to discuss the ways in which the framework provided by these dimensions did and did not prove useful for the analysis of the media systems they addressed. Finally we asked them to reflect on what other media system models and concepts for comparative analysis might be proposed on the basis of the cases or regions they studied.

The initial focus on the conceptual framework of *Comparing Media Systems* seemed important to giving the book a common structure. At the same time we were well aware that this enterprise involved a kind of contradiction; it ran the risk of producing exactly the kind of universalizing extension of our framework we hoped to avoid. We were calling for an extension of comparative analysis beyond a framework centered on Western cases, and yet we were placing at the center of the analysis a book based precisely on those cases. This issue provoked significant discussion in our meetings. We hope readers will judge the results of the enterprise useful in two ways: first, that the chapters presented here use cases outside the scope of our original analysis to subject the framework of *Comparing Media Systems* to critical scrutiny, and second, that they use the dialogue with our book to produce useful insights that can point toward the formation of new theory. This project is not based on an assumption that *Comparing Media Systems* is a natural starting point for analysis of media systems around the world; on the contrary, we were motivated to undertake this project precisely because we consider the application of our framework to cases outside the regions we studied to be highly problematic in many ways.

## The Methodology of Comparing Media Systems and Its Applicability to Other Cases

*Comparing Media Systems* was based on a "most similar systems" design. The adoption of this approach was motivated by two kinds of concerns. One was practical: We did not feel we could learn enough about a wider range of media systems to be able to analyze them competently, particularly because there was limited systematic research on media systems in many parts of the world and our study was based more on the synthesis of existing research than on primary research. Second, most similar systems designs, as Lijphart (1971) has argued, are useful for "reducing the property space of the analysis," that is, for limiting the number of variables an analyst is forced to deal with. In some studies, this is done

to facilitate causal analysis, as the analyst tries to match cases on all but a small number of variables whose effects can be isolated. Our study was oriented toward theory building rather than hypothesis testing; for us, reducing the property space of the analysis was important because we wanted to think through certain concepts and relationships – to unpack the concept of "journalistic professionalism" for example, and to explore how it was related to partisanship and to political culture – and we could only do this coherently if the number of concepts we were dealing with was limited.

One other aspect of the methodology of *Comparing Media Systems* is also important to emphasize here. Our approach to social theory is a historical one. Our analysis was intended as a concrete, historical analysis of a particular group of media systems, not as a set of general categories for understanding media systems regardless of time and place. In particular, our three models were intended as ideal types that would summarize distinct patterns of media system development among particular groups of countries, and they should be thought of as bound to the cases from which they were generalized. To be sure, we did suggest that they could be of some relevance to the analysis of other systems. What we intended was to suggest that the three models might be useful as points of comparison, for noting similarities and differences, and for beginning the process of asking why these similarities and differences existed. We certainly did *not* intend for them to be used as a set of categories *classifying* any and all media systems, nor did we intend that comparative analysis should be carried out by "applying" our three models to other cases, a phrase we often hear.

The chapters in this volume vary in the extent to which they "apply" our categories, critique them, or just use them as a starting point and move on to address other concepts. This reflects the fact that different media systems are more or less proximate to those we study. For example, Bogusława Dobek-Ostrowska ends her chapter on the Polish media system by locating Poland on the triangle diagram we use to represent the relationship of our eighteen cases to the three ideal types. She places it near the middle of the axis that separates our Polarized Pluralist and Liberal models – an interesting finding because many had asked us why the area between those two systems seemed to be unpopulated in our analysis and whether there was some theoretical reason why a mixed model between those two types was impossible. The answer is probably that the absence of cases in that part of our triangle is a historical accident and that in fact many media systems worldwide combine important

characteristics – commercialization and politicization – of the Liberal and Polarized Pluralist systems simultaneously. East European scholars were among the first to use *Comparing Media Systems* to analyze their own media systems and tend more than other scholars to fit those cases into our framework, often speaking of the Italianization or Mediterraneanization of East European media systems in the post-Soviet period, even if they do so with important qualifications.[1] This makes a lot of sense. Poland is a part of Europe after all: It was always a part of the European state system, has now been reintegrated into Europe as a member of the EU and is subject to its rules for media policy, and has many media outlets owned by Western media companies. In contrast, Adrian Hadland reports that the South African media system is a "square peg" in the "round holes" of our three models – even if, as a country with strong European institutional and cultural influences and a relatively strong capitalist sector, it probably has many more similarities to our three systems than most developing countries. To try to fit China onto the triangle defined by our three models would simply be silly.

With this in mind, we have organized the first part of this book, which is made up of individual case studies, to move from cases more proximate to those of *Comparing Media Systems*, which can reasonably be analyzed, up to a point, by applying the conceptual framework developed there, toward "most different systems," which clearly represent alternative models and require a very different conceptual apparatus.

If the three models, which form the first component of the conceptual framework of *Comparing Media Systems*, are difficult to transfer outside the original context of our study, this is less true of the media system variables or dimensions of comparison that form its second component. One can ask about any media system, "What is the role of the state?" or "What is the degree and form of journalistic professionalism?" – although it is conceivable that the answers would prove unenlightening in some contexts. In fact, we were struck by the fact that the list of variables we proposed to compare the relationship between mass media and politics in the Western world seemed to hold up reasonably well as we shifted to a "most dissimilar systems" design, at least in the sense that the participants were almost always able to tell a coherent and interesting story about how their cases could be understood in relation to those dimensions. At the same time, it is clear that the particular conceptualizations of these four

[1] We offer more extensive reflections on the way we see East European media systems in relation to our framework in Hallin and Mancini (forthcoming b).

dimensions developed in *Comparing Media Systems*, the particular values that the variables connected with them take in our analysis, are tied to the eighteen cases of our original study and often need to be reconceptualized to apply to other cases. In fact, this reconceptualization is where much of the value of this enterprise lies, in the way the authors were forced to rethink our media system variables – to ask, for example, what "political parallelism" might mean outside the context of the European party systems for which the concept was originally conceived – as well as to suggest new variables that might be important within other contexts. In the concluding chapter we focus on some of the most important insights generated by this rethinking.

The core conceptual framework of *Comparing Media Systems* also included one additional component, a set of political system variables, that we proposed were relevant to understanding the different patterns of media system development, the distinction between "moderate" and "polarized" pluralism, for example, or between Liberal and Corporatist models of democratic politics. Many, although not all, of the variables we deal with in this part of our analysis are quite closely tied to the context of West European and North American political history; we suspect they are more difficult than our media system variables to apply outside their original context and so did not ask participants to address them in any standardized way. However, it was one of the most important principles of our approach that media systems had to be understood in the context of social and political institutions more generally, and we sought in *Comparing Media Systems* to build bridges between the fields of media studies and of comparative politics and political sociology. For this reason we did ask participants to think about what literatures on, for example, the nature of the state in their particular political systems might be important for understanding media and politics. Because these literatures are necessarily diverse in a collection of this sort – the literatures on the Chinese communist state or the Arab state are quite different from one another – we do not try to generalize very much about political system variables. However, we address selected points related to these literatures, including, first, the question of party systems and other ways in which political conflict and diversity are structured – crucial for the reconceptualization of the concept of political parallelism – and, second, the relation of rational-legal authority to media systems, which we think is very important to understanding both journalistic professionalism and the role of the state.

Many of the chapters in the book also address the question of convergence or homogenization. In the last chapter of *Comparing Media Systems*, we discuss a historic shift in European media systems that can be understood to some extent as a shift toward the Liberal model of commercialized, politically unaligned, or "catch-all" media. Many of the investigations presented here address the question of whether this process can also be seen in other parts of the world.

The book is divided into two parts. Part I comprises seven case studies: the media systems of Israel, Poland, Lithuania, Brazil, South Africa, Russia, and China. Part II comprises multicase studies and has more of a focus on methodological issues concerning the units of analysis for the comparative study of media and politics. As discussed, *Comparing Media Systems* centers around the concept of a "media system," and the chapters in this part raise a series of issues about this concept as a focal point for comparative analysis: whether media systems should be analyzed as national or transnational; the value of media system "models"; the possibility of focusing on other units such as processes rather than systems; and the question of how to understand structure, agency, and change in comparative analysis. The book closes with a concluding chapter in which we summarize some of the principal conclusions that we believe have emerged from this project and respond to some of the most important issues that the participants have raised about our own analysis and about the future of comparative research on media and politics.

We are very grateful to all the contributors to this volume: We learned a lot from them, and this book is only possible thanks to their involvement in the seminars that paved the way for the book and their willingness to do the often extensive work of developing a chapter that fit the collective enterprise. We would also like to thank a number of scholars who participated in earlier phases of this enterprise and who contributed significantly to the discussions that led to this book, including Mine Gencel Bek, Sahar Khamis, Myung-Jin Park, and Miklós Sükösd. We are grateful to the Regione dell'Umbria, the World Universities Network, and the Institute for International, Comparative and Area Studies of the University of California, San Diego, for funding that made possible our workshops in Perugia and San Diego, as well as other crucial components of this project. Special thanks also to Jackie Tam for patiently and efficiently handling the logistics for the San Diego workshop.

# PART I

# CASES