

Chapter 4

Scale economies and international communications inequality, 1820-2020

Jeremy Tunstall

Each new communications era across the last 200 years has introduced new economies of scale and fresh inequalities. The biggest single inequality has been that, at least since 1870, the United States and its people have been ahead of the rest of the world. Since around 1920 Hollywood has led world entertainment. Since 1980 Hollywood has been merging with Silicon Valley tech and with computing and telephony. The United States has been uniquely successful in attracting finance from banks and from Washington, and in combining continental with local and intimate communications.

Across 200 years, the communications industries have exhibited extreme economies of scale alongside extremes of social inequality. Within these 200 years there have been three major phases.

During 1820 to 1920, there were huge increases in communications scale and in scale economies. Until the introduction of steam printing around 1820, the newspaper was a hand-made product. In the next hundred years, some leading newspapers went from daily sales of perhaps one thousand to daily sales of over one million. Audience (or readership) inequalities were extreme. Across Europe (but not the USA) newspapers initially suffered penal taxation and elite people read an expensive elite daily paper while most Europeans in the 1830s and 1840s were still illiterate and reading nothing. Between 1850 and 1900, literacy rates in Euro-America hugely expanded, but still in 1900 most working-class people had no media contact. Meanwhile, across Asia and Africa, the few elite port city newspapers had very small sales.

We can now see the years 1920 to 1980 as the classic era of the “mass media”. During these years, the printed press and silent movies were joined by talkie movies, radio and TV. Hollywood was found guilty of cartel behaviour and production companies were forbidden to own theatre chains. Various forms of American semi-cartels were, however, allowed to continue. Three radio-and-TV networks (NBC, CBS and later ABC) prevailed. A few American newspaper chains each owned newspapers across a number of big key cities. Europe developed a somewhat different pattern of scale economies, which included “public service” radio and TV monopolies.

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During this 1920-80 classic “mass media” period, the Hollywood movie business achieved extended scale economies by first selling its movies into theatres around the world and then offering multiple showings of the same movies to TV channels around the world (Elberse, 2013). These extreme scale economies went alongside some reduction in consumer inequalities. Across Euro-America much, or most, media output was aimed at the mid-market, both national and regional. But in some other respects – such as the Hollywood and European star systems – inequality may have increased (Tunstall, 1977).

The years 1980-2020 saw the rapid emergence of the internet, online, smartphones and the Silicon Valley companies. Audience numbers would now routinely be hundreds of millions, or a billion, people. An elite of multi-millionaires and some dollar multi-billionaires emerged. Meanwhile, a billion or two of the world’s people have become seriously more communications disadvantaged compared with their fellow citizens.

These post-1980 scale economies incorporated several new features. The rocket-like speed of company growth saw separate new domestic garage start-ups quickly advance to reaching hundreds of millions of people in America and around the world. These new Silicon Valley success stories typically involved a huge (or monopoly) share of one narrow market, such as Google in search. This led to the big successful company seeking to broaden its base by acquiring smaller companies in its own and other markets. Google (under the new umbrella name of Alphabet) soon owned another 200 companies.

Scale economies were further stretched by the effective merger of Silicon Valley (San Francisco) with Hollywood (Los Angeles) – involving Hollywood movies and Hollywood TV with, for example, Netflix’s offer of new premium drama and entertainment series. Netflix’s success soon attracted “streaming” competition from Apple, Amazon and others.

These fresh scale economies emerged alongside increased intra-industry inequalities. This new mix of Pacific coast communications capitalism developed its own small group of candidates for the title the World’s Richest Person. These new billionaires had initially tended to present themselves as geeky students in T-shirts, but most were in fact graduates of MIT, Harvard or other Ivy League universities. While still in their twenties, they attained big start-up loans from Wall Street and other banks (Rogers & Larsen, 1984). Below the dominant owner level, an elite group of CEOs and managers earned annual salaries in the tens of dollar millions. These companies tended to have smallish “professional” staffs, paid high salaries – such as ten times the national US average. But these new companies also employed largish numbers of lowly paid, low skilled, and often casual, employees. Many of these lowly paid people were employed in China or in cheap locations across Europe.

The star performer or celebrity of print, movies or radio/TV was a traditional category within the communications industry division of labour. Since 1980, the new communications landscape features many new styles of star and celebrity. Stars can now commune with thousands or millions of followers on a daily basis, offering

a big advance on the fan magazines and print advertising of traditional Hollywood. Today's celebrities can also turn themselves into a commercial product or service for sale to their followers.

Since 2010, a number of economists and others have pointed to increased levels of inequality in Euro-America and in the world (Atkinson, 2015; Pickett & Wilkinson, 2010; Stiglitz, 2012). Within the now huge communications sector, several strategic changes have had big implications for social inequality. Most communications depend upon advertising (for revenue and publicity) and/or on subscription. There has been a big switch of advertising revenue, away from newspapers and print. By 2018, about 40 per cent of world advertising spend went into online and social communications, while over 30 per cent still went into television. There had been a big drop in newspaper sales – and especially in the more mass-market newspapers.

Another obvious aspect of international communication inequality was the emergence of a small group of dominant American companies after 2010, the so-called FAANG group (comprising Facebook, Apple, Amazon, Netflix and Google). But by 2018, the key group was really much bigger and included Ali Baba, Amazon, Apple, AT&T, Time Warner, Baidu, CBS-Universal, Comcast, Disney, e-Bay, Facebook, Fox, Google and Netflix. The total leadership group by 2018 was at least 25 companies. Three of these were Chinese (Ali Baba, Baidu and Tencent). Nearly all of the other companies originated in San Francisco, Los Angeles or Seattle. This American dominance was, and still is, the biggest single inequality in world communications.

Euro-American communications inequality since 1870

In most areas of communications, Europe has been behind the United States since about 1870. European countries have had much smaller national populations than the US. Most European countries, for many of the last 150 years, have also been much less democratic and have had fewer market driven communications services.

The United States with its several governmental levels (federal, state, county, city) and its continental scale has been successful in developing communications industries which combine the macro (or US wide) level with the micro (small town, street, family) level. The recent communications revolution, exemplified by the smartphone computer-in-your-pocket, enables an individual to access national and international news and entertainment as well as talk with people in the small town, in the workplace or in the family.

Americans initially imported newspapers from London and Europe, but by 1870, the American newspaper industry had become the world's largest. In 1870, the US already published 5,871 newspaper and magazine titles – more than Britain, France, Prussia, Austria, Russia and Italy combined (Hudson, 1873). Most of the commercial, journalism, and technology advances of the British and French press around 1900 came from the United States. This included Hoe printing presses, Mergenthaler Li-

notype machines and the use of interviews, telephones and typewriters by journalists. Macro (continental) and micro (local) elements were combined within a number of American communications revolutions. From about 1870 and onwards very small local weekly newspapers could incorporate whole pages of Big City and national material from suppliers in Chicago and other large cities. By 1880, the Kellogg company was supplying pre-printed “boiler plate” pages to 800 papers, mostly across the mid-west states. News agencies, based in New York and Chicago, supplied fast daily news to the newspapers of the continent.

Both the telegraph and the telephone offered continental as well as local or family communication. Even the new movie theatres in 1900-14 offered live local entertainment and music alongside the Hollywood silent films. Both radio and television also developed many hundreds of very local stations alongside the NBC, CBS, and later ABC, networks.

When American cable-and-satellite boomed in the early 1980s, the industry was initially run by quite local companies. A common situation was a city in which perhaps four cable operators were each allocated one quarter of the city. This quite quickly changed into the traditional American pattern of a very few large companies (Tunstall, 1986).

The American communications industries have several other features to which Europe has given somewhat less attention. One of these is bank finance. The main source of communications industry finance has always been Wall Street but other banking centres – including Boston and San Francisco – have also played a part. One interesting California financier was Amadeo Peter Giannini, a San Jose-born banker who founded the Bank of Italy, which was later renamed the Bank of America. Among his many investments, Giannini acquired the original Hollywood major, United Artists.

Big Finance played a major role in the rapid growth of the Bell/AT&T semi-monopoly of the US telephone business. Aggressive growth meant that the United States had three times as many telephones as Germany per thousand population by 1930, and four times as many as Britain.

Wall Street played a very active role in the entire twentieth century history of Hollywood – including Hollywood silent and talkie movies, network radio, network television, music and cable television.

Alongside the banking system, the Federal government has assisted the Communications industries in a distinctively American and non-European way. The US Constitution, federal support for railroad construction – and subsequently the Department of Defense and the CIA – have all financially supported the American media (Stonor, 1999). The term “Soft Power” comes from a Harvard academic who also held a senior position in the Department of Defense (Nye, 2004). The Internet itself, of course, derives from the Department of Defense’s Arpanet project (Castells, 2001).

From the 1980s onwards, “Communications Deregulation” initially had an anti-trust flavour and was mainly focused on the giant Bell (AT&T) Telephone semi-monopoly. The Europeans largely failed to grasp what deregulation was all about, because Europe has a different tradition of public utilities, state owned telephony and

public broadcasting. Meanwhile, deregulation quickly moved on towards building a communication empire across the world in general and across Europe in particular. Few politicians, civil servants or journalists in France or Britain seemed to grasp the reality of America's deregulation offensive (Palmer & Tunstall, 1990). The Washington system of regulatory agencies (such as the FTC and FCC), as well as the sub-committees of the Senate and the House commerce committees, was indeed complex. This complexity has also increased, with new Washington military–security anxieties about both China and Russia.

Already in the 1980s, communications policy lobbying on Capitol Hill employed many hundreds of lobbyists. The number has more than doubled since then and American communications lobbying activity has spread to Brussels and to European and Asian national capitals.

Advertising finance is of great importance in American communications (alongside paid subscriptions). One of the biggest changes of recent years has been the migration of much advertising money from print and TV into Facebook, Google and other social media. Once again French, British and other European policymakers have been extremely slow in grasping the strategic significance of advertising in communications commerce and policy. This is despite the fact that Britain and France had two of the world's four largest advertising agencies in WPP and Publicis.

Satellite era: Euro-American inequalities

In retrospect, the years between 1975 and about 2005 can be seen as the satellite era; the European Space Agency (ESA) was launched in 1975 and satellite-to-cable television became prominent.

Satellite innovation, like so much in communications, was originally pioneered and funded by Washington (Fortner, 1993). The US also pioneered both satellite-to-cable and satellite direct-to-home television (Tunstall, 1986). During 1975-2005, the United States continued to be the world's leading television exporter – especially of entertainment programming and entertainment formats. Hollywood continued to be the world's leading exporter of theatrical movies (for theatres and television). These years also saw a big growth in higher priced American premium TV series.

By 1995, the median American home had about 40 TV channels (Tunstall & Machin, 1999). Meanwhile, in 1995, most of the world's households still had no TV channels at all. In affluent Europe, most households had only a very few channels in 1995; and even on these few channels, a sizeable slice of the content was American.

However, while Europeans suffered from media inequality in terms of quantity and choice, Europeans were perhaps being better and more equalled supplied with television. Public Service Broadcasting remained quite strong across much of Western Europe during 1975-2005 and Europe could see itself as the world leader in the television coverage of the world's most popular game – Association (or Soccer) Football.

Another source of communications ambiguity and paradox was the break-up of the Soviet Union and its old “empires” within the USSR and Eastern Europe. Some twenty “new nations” had arguably become more equal in political terms, but more socially unequal than previous to the USSR break-up. Moscow had perhaps contributed to its own demise by subsidising, across the USSR, Russian language as well as “national” language press, radio, TV and movie production. After 1990, 14 Non-Russian Republics – with a combined population of 140 million (1990) – lost their Moscow media subsidies. The most populous of these “new” (ex-USSR) countries in 1990 were Ukraine (52 million), Uzbekistan (20 million) and Kazakhstan (17 million). Russia, plus some other former USSR republics and some other East European countries, operated somewhat chaotic media import strategies, which in some cases involved importing Latin American TV soap operas (Tunstall 2008).

The Satellite era also had paradoxical (more equal and less equal) West European communications consequences, especially for smaller population and/or for less centrally located countries, facing a conflict between their “national” language and competing, smaller and more regional languages. Such countries included Spain, Belgium, Switzerland and Finland as well as several new and old countries in Eastern and South Eastern Europe.

News agency inequalities foreshadow internet inequalities

The world map of today’s internet, indicates large numbers of cables crossing, in particular the North Atlantic (especially from France and UK to the US), and spanning the North Pacific from the US West Coast to Japan, China and East Asia. There are big additional, heavily internet cabled, routes around Africa, around Latin America and around South Asia.

The world map of telegraph lines used by the news agencies around 1870 looked very similar. The first international submarine telegraph lines included Britain-France (1851) and Britain-USA-Canada (1866).

For most of the years 1860-1960, Britain and France were world leaders in telegraph connections, linking up their empires with imperial news agencies headquartered in Paris and London (Boyd-Barrett, 1980; Boyd-Barrett & Palmer, 1981; Rantanen, 2009; Read, 1992).

The French agency (Havas and, from 1945, Agence France-Presse) and the British agency, Reuters, wanted to sell their news to domestic newspapers of differing political persuasions and to the newspapers of other nations and empires. These international news agencies not only invented fast news; they also developed “neutral” or “non-partisan” news. Havas began in 1835 with stock market news. Next came broader text news for newspapers. Much later still came photographs, radio news, television news, cable news and then the internet. The jump into TV news was especially costly because it often required expensive air travel within Asia or within Africa, as well as

expensive transmission technology and a TV news reporter was typically supported by a camera person and several others.

During the 1975-2005 Satellite Era, a combination of American, British and French news agencies continued to lead the world news agenda. But fresh competition emerged, for example from CNN and other specialized TV news operations. There were numerous additional news-by-satellite offerings from government owned-and-operated “external” broadcasters.

For most of 1975-2005, the provision of world news by satellite was led by the British Reuters and French AFP (Tunstall, 1992) with the United States in third place. The leading American agency, Associated Press (AP) was still owned by the American daily newspapers, whose owners did not want AP to become a TV news agency. This initially left the field of world news by satellite to the British Visnews – a joint enterprise of Reuters and the BBC. In 1975, Visnews was “the world’s leading supplier” of TV news, reaching (it claimed) 99 per cent of all TV receivers in the world (Tunstall, 1977: 23-35, 48-49). Visnews subsequently came to be fully owned by Reuters and was rebranded as “Reuters TV”. For at least twenty years after 1975, London continued to be the world leader but two American operations provided some competition. WTN (owned by the American UPI news agency and the British ITN) was based in London but struggled to compete, largely because UPI was losing in its overall competition against AP.

Associated Press (of New York) did eventually enter the Satellite era in 1983-84, when it began to distribute all of its domestic US news (text, picture, radio, TV) by satellite. When AP decided to enter international TV news, it located its APTV news operation in London; British personnel from Reuters played leading roles in this. During the 1990s, Reuters TV and APTV ran what might be called a comfortable duopoly of world TV news provision. In 1998, Reuters TV had contracts with 300 national TV networks. Each day it transmitted 16 major half hour news feeds around the world; news feeds that were accompanied by scripted material (Tunstall & Machin, 1999).

This Anglo-American duopoly (and the role of Europe in world news) altered dramatically around the turn of the century. If the news agency achievement circa 1900 was the “factualization” of news, the strategic agency change circa year 2000 was the “financialization” of news. Michael Bloomberg launched his on-screen financial data company in 1982 and opened a London office in 1987 (Tunstall & Machin, 1999). Reuters had some success in the 1970s in beefing up its computerized data services, but could not decide how to combine data and news across the media and across the world. Reuters was acquired by the Scottish-Canadian Thomson data company, and Thomson-Reuters, although headquartered in Toronto, has operated primarily from New York. Financial news and data became more central in the international news agency world, now dominated from New York by the trio of Associated Press, Bloomberg and Thomson Reuters.

Since the peak of the Satellite era in the 1980s, news in Euro-America and around the world has transformed the old C.P. Scott distinction between “facts are sacred,

comment is free". "Facts" have been considerably redefined in the direction of financial and computerized data; this works remarkably well in sports news as well as in financial, economic and business news.

The subsequent internet era has seen strategic changes in the old world of facts separate from comment. In Euro-America, radio and TV have become less characterized by public service and neutral news. As so often, the US has led the way; CNN and NBC news differ sharply from Fox News. Paradoxically, it could further be said that traditional elite "neutral" newspapers have – in opposition to more partisan news – themselves become more partisan.

In Euro-America and around the world, the internet era has created hundreds and thousands of fresh "news" offerings. But most of these "news" offerings (including some of the best known) make little effort (and put little finance into) gathering their own news. Instead, they mostly use old fashioned news from the international and (linked) national news agencies. Then, some kind of comment and opinion (perhaps described as "analysis") is, in practice, the main "news" offering.

More or less equality in the internet era?

The internet era seems to have increased communications inequalities. Across Euro-America, members of each national elite can subscribe to elite general and financial newspapers (paper and/or online versions) and can also subscribe to other expensive specialized national and international news services. Meanwhile many working-class people across Euro-America no longer read a daily paper or follow the national TV news, but may instead follow insurgent "news" offerings which are predominantly prejudice and comment, not news. Something similar, but more extreme, seems to be happening across the world. Governments across the world tend to be strong across old, new and internet media. In many countries, minorities (of language, religion and politics) try to "shout back" against the central government. But their shouting back may be even more partisan than the voices of the government. These minorities across many nations may be becoming even less well informed than previously. Inequality advances.

If the great majority of Europeans and Americans are using the internet and/or a smartphone on most days of the week, does this mean that we are becoming more equal? One of many new complexities is that, while the internet and the smartphone provide unprecedented quantities of material, even the most basic (and fast moving) numbers appear to be unreliable and contradictory.

There is a big difference between what is now available and what most people actually look at, read, and consume. Arguably we have become less equal because much of the material which comes towards us is actually directed by advertisers who have been studying our individual buying habits. Another obvious possibility is that the internet reveals the dazzling possibilities of wealth, education, consumption and leisure – but does little to help us acquire and achieve these things.

While Europe considers these and other problems, China and the USA have travelled further and much faster into the 5G and the internet era. China's tech giants – such as Alibaba, Baidu and Tencent – confront not European, but American, companies. China has its four-way New Silk Road to Europe project – by rail, by road, by sea (via Colombo in Sri Lanka and via Suez) – and of course by internet cable. The large cities of eastern China were the first in the world to adopt a nearly complete regime of cashless payment.

In terms of direct foreign investment and of Chinese citizens living outside China, the biggest single destination is the USA, followed by South East Asia, and Western Europe in third place. The next biggest destinations for Chinese influence are Canada, Japan, South Korea and Australia. Chinese financial investment in Africa, although much discussed, has been low.

The United States is still far ahead of China in exporting entertainment with its fresh combination of Hollywood and Silicon Valley and has developed new format services such as Netflix. We seem to have entered a period of an awkward America-China duopoly with America dominant in content while China increasingly leads in tech hardware.

This America-China duopoly is unpredictable, because it depends on many commercial, governmental, and security-intelligence issues. There has already been much mutual rivalry and suspicion and fresh areas of strategic rivalry are emerging – such as competition for supplies of cobalt (for batteries) from the unstable location of Congo.

In any discussion of increased equality or inequality, language is significant. The United States has an advantage with the English language and its use by educated elites around the world. Meanwhile, the Chinese government claims that 80 per cent or 90 per cent of the Chinese population, or over a billion Chinese people, speak Mandarin. This assertion depends upon at least ten Han languages being counted as Mandarin. In fact, the traditional language of Quandong is Cantonese and the traditional language of the Shanghai area is Wu. Current Chinese government policy is to absorb these ten separate Han languages into North East China Mandarin (The Economist, 2018). This project is comparable to a decision by the European Union to make Italian (with its ancient links to Latin) the sole language of education and government across Europe. Meanwhile Beijing is also claiming to be nurturing “tribal” languages such as Tibetan and Uighur. This language policy has been accompanied by conditions placed on communications imports from America. Google has had to submit to some Chinese censorship and Hollywood is only allowed to export three movies per month to China.

Meanwhile India probably supplies the biggest number of communications paradoxes (Tunstall, 2008). For example, the poor can influence the price of an elite newspaper: Some years ago, the elite Indian publication The Times of India considered becoming a free newspaper. However, it could not do so (the editor told this writer) because people in Indian cities who cannot afford either a flush toilet or toilet paper, use old newspapers as toilet paper. As a result, there is an active street market in yes-

terday's newspapers. Had The Times of India become a completely free newspaper, the city poor would have picked up the free newspapers each day for use as toilet paper.

Since the 1930s, India has had the world's largest output of theatrical movies. As recently as the late 1980s, India was annually producing 170 Hindi movies and an additional 580 movies in seven other languages. Leading actors and actresses typically starred in 200 or more movies during a long career. There are several traditional genres within Indian movies; a heavy focus on music, song and dance helps to span across different Indian languages. Since around 1970, television spread into hundreds of millions of Indian homes – and was then followed by the Internet and mobile phones.

In some respects, the movies, the newspapers and the internet may have helped many millions of Indians to feel more equal. But there is some evidence that Indian inequality has increased in the internet era. In the mid-1990s, India had only two dollar billionaires; two decades later it had over one hundred dollar billionaires. Income-per-head in India is about half the level in China. The caste system continues to be very significant in politics and in the old media. India still has its “tribals” and its “other backward castes”. Especially in mountainous East and North-East India, “tribal” people are in violent rebellion against coal and metal mining, logging companies, and the government.

In a 2018 study of young Indians, Snigdha Poonam points out that two thirds of India's 1.3 billion people are aged under 35 and provides strong evidence of both more and less Indian inequality in the Internet era. Many millions of young Indians have access to the Internet and/or smart phones, which enables them to see far beyond their own everyday shortage of cash and (often) lack of paid employment. They see spectacular extremes of wealth and poverty in Indian cities; they see what America, China, and Europe are doing, but they cannot participate. Their several hours a day of staring at screens seems to make many young Indians feel more, not less, unequal. And angry.

In Euro-America the young may also feel more unequal as the communications system tells them that yet another new kind of inequality derives from older people with money and younger people without a pay increase.

Conclusion

In conclusion, the media have always exhibited extreme scale economies and audience inequalities. The more recent social communications offerings exploit yet larger scale economies and are marked by yet larger audience/user inequalities. Increasingly, the old mass media and the newer online social media are merging into a single Silicon Valley plus Hollywood industry.

For 150 years, Europe has been slow to grasp American developments such as Washington and military finance for old and new media, bank finance for youthful entrepreneurs, rapid growth of new industry sectors, followed by massive exports

of the content and services to Europe and the world. The Silicon Valley companies quickly create new billionaires. The middle class subscribe to traditional mainstream media and can also subscribe to new big budget entertainment. Poorer people cannot afford all of this. Similar inequalities exist in Europe. Europe also faces an additional inequality in the increasing dependence on imports from the US Pacific coast, 10,000 kilometres away.

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