

NEW COMMUNICATION MEANS AND THE ECONOMIC CHALLENGES BROUGHT IN MASS-MEDIA

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Abstract:

Analogic technology, the old ways of production, distribution, consume and economic fundaments of the mass-media industry are left behind by the new demands and requirements of the creative economy in the digitalization context of the mass-media system. In fact, not only mass-media goes through this transformation, but the whole society. The implications of the digital era are far long to be over and they will affect all mass-media segments: written press, audiovisual, on-line press and social media. The economic aspects, as well as the technical ones, editorial, distribution and final consumers aspects, all will be different from what we experienced in media industry until digitalization. The question is, are we ready to enter into a new economy: the digital economy? Are we ready to enter into a new culture: the digital culture? We entered in the smart world, but do we understand what is happening? The editorial teams that experience a fundamental change of thinking, will be able to overcome this times challenges? These are some of the questions that bothered us along this research. We tried to block in the logic of the system with the new varieties and variables determined by the digital era in order to understand it. We tried to discover the elements whereby mass-media industry and economy can profit more of the digitalization advantages. We tried to find economic solutions for the negative consequences produced in the process of media industry digitalization to be attenuated.

Key words: mass-media; digitalization; creative economy, internet, Romania.

JEL clasification: L82; Z10; O30.

1. INTRODUCTION

The print, the telegraph, the radio, the printer, the television, the computer, the internet, the smartphone, the tablet and digitalization, all are instruments that metamorphosed human communication and along with this industry, mass-media economy. If the means and the messages are ontologically united, as McLuhan postulates, than, with every change of the communicational paradigm we have also a change of the message and particularly of its effect on individuals and society overall. All modern communicational instruments have generated models that transformed people. *The printed media and the audiovisual contributed together* – interweaving, combining and completing the offer package in media market. This market grew more and more along with the technological development and the growth of global economy.

Methodologically, starting from the observation of current situation in mass-media industry and economy, we propose to realize a content analysis. We will discuss from an economical perspective aspects about the current stage of media industry in the digitalization context, analyzing the opinions of other researchers regarding these subjects. We are trying to present the concept in the light of other reference works and to illustrate with real cases and examples from Romanian and international mass-media. We will go through the literature and we will try to sustain with empirical data the subject discussed theoretically. In order to achieve this, we will use official statistical data and relevant data extracted from other researchers work. In the research of mass-media economy, we will study the economic models, comparative analysis and we will analyze the positions of international organizations.

In the content of this work, we will present the new communication means and the economic challenges brought in mass-media sector. We will follow the path of the economic challenges of media industry that came along with the technological transformation determined by computers and

internet. We propose to realize an analysis of internet expansion and the role of the internet in media industry and economy.

2. COMPUTERS AND INTERNET MEDIATED COMMUNICATION

For a period a fifty years, the dominant position in media industry was owned by television, but in the last twenty years, the television supremacy was overtaken by computers. These modern instruments have more wider dimensions and application as well as a design that bundle movement, imagine, word and sound, introducing among the ones that are seen simulated and virtual realities. „Technology intrusion in daily life indeed demonstrates that proxemics, domestic and trivial values receive „cyber culture” help. Imagination, fantasy, the desire for communion, forms of solidarity finds in „cyberspace” and internet highly performing vectors.” (Maffesoli, 2003) Mass-media professionals anticipated that the technological contribution will give a boost to media sector development. Giovannini (1989) affirmed that „technology determines us to prevent the number increase of communication channels, a bigger capacity of compressing information in each channel and a bigger facility to takeover, storage, assort and recover information”. Computers and the internet managed to increase the number of communication channels and their capacity of depositing, processing, assorting, recovering or transferring surpassed all expectations. Moreover, computers interconnection offers the possibility of users to see, to transmit images and messages in text format. The internet changed the face of media industry! As Friedman (2008) states, „on internet people take and give, chat and establish connections, deliver and receive ideologies, buy and sell...all these in a practically impossible way to control.” The world of communication had been revolutionized by the internet like never before! The first inventions: the print, the paper, the telegraph, the telephone, the radio, the television and computer had prepared the land for this integration of the world interconnection like never before. Moreover, the new information technologies (i.e. internet, data bases, mobile phone etc.) allow a “mass personalization”, which can be defined as a desire to provide communications, products and services adjusted to customers (Badulescu, 2012, p. 62).

2.1. PARADIGM SHIFT: FROM ECONOMY OF SERVICES TO DIGITAL ECONOMY IN MASS-MEDIA

The new course of things is oriented towards the new technologies abandoning step by step the traditional forms of media. Mass-media products and services, packed in years on paper format printing and audio-visual based on analog broadcasting, are on the way to be transformed due to digitalization process. Digitalization changed not only the face of media industry, the way of governing, the economy or affairs administration, but also our daily life. The preoccupations and the way people live an ordinary day of their lives is significantly different compared to a few years ago. Policy, economy, industry and trade had been affected and transformed by the impact of digital world. The change of paradigm from the economy of services to digital economy brings an important change in media industry. The first step in this change was the internet.

But any change in the way of communicating messages has supporters and opponents. In the actual situation it seems that we are witnessing saturation and apogee regarding traditional forms of the mass-media: *print and audiovisual*. Both wings of this industry are involved today in the reinvention process. Politicians, economists, journalists and IT specialists talk, plan and act trying to reset media industry in the new frame of *creative economy*. Neelie Kroes, vice-president of the European Commission and European Commissioner for Digital Agenda, declared: „Fast and large scale internet represents *digital oxygen*, and it’s crucial for the prosperity and welfare of Europe. These measures will allow us to make sure that European people will benefit high class internet, just how they expect and how they deserve, so they could have access to the content and services they desire.” (Neelie Kroes, 2010) Mrs. Neelie Kroes promises require the change of paradigm from services economy to digital economy. The changes are multiple, targeting technological,

juridical, social, political component and most important, the *economical* component. In fact, transformations in media industry are determined by global realignment marked by computers, online and digitalization.

2.2. ECONOMIC IMPLICATIONS OF THE NEW TRENDS IN THE CONSUMPTION OF MASS-MEDIA CONTENT

It seems that multimedia equipment draw more and more users to the online sector. The traditional forms of media are step by step replaced with more interesting versions. If in the '90, CD-s were the main support for music, today, a large part of the musical content is accessed on the internet. It seems that the same trend remains regarding TV, radio or newspapers. Economic data show the consumption trend and speak for themselves.

„In Europe, the consumers expenses for video digital contents (movies and television serials provided on internet) reached EUR 364.4 million in 2011 (+41,8% towards 2010), in a market of physical and digital video contents worth € 9493,8 million (-4,6% towards 2010). It is estimated that the unsatisfied demand for the services VoD - „video-on-demand” offered on pay by television operators from other member states is between EUR 760 million and EUR 1,610 million annually. It is expected that the number of video content users on internet to raise, at a global level to 1.5 million until 2016, towards 792 million in 2011. In the third trimester of 2012, in EU there were 306 „video-on-demand” (VoD) services; 72 hours of video content are loaded on YouTube per minute” (COM 2013 / 231 final).

Increased interest manifested by consumers of digital video content, as the data presented by The European Commission show, are primarily materialized in economic effects. Consumers of digital content prefer to pay for this type of information even if similar products in analog version are delivered for free. Media Initiatives in the Media FactBook annual report presents us the structure of mass-media market according to the channel used for distributing the information and advertising revenues. Based on these criteria mentioned in Media FactBook report presented in 2013 and 2014, we discover the trends of Romanian media market and the surrounding countries of Romania (countries that share some common elements: a relatively similar past, obstacles and challenges of economic relocation based on market economy, go through similar stages of development and seek to reduce the economic gap compared to de developed countries). So we can notice that the digital sector monopolize more and more the mass-media advertising market detrimental to other traditional media sectors. An important indicator of the economic analysis is the advertising revenues according to the channel used for distributing the information, aspect that we try to catch in the Figure no.1.

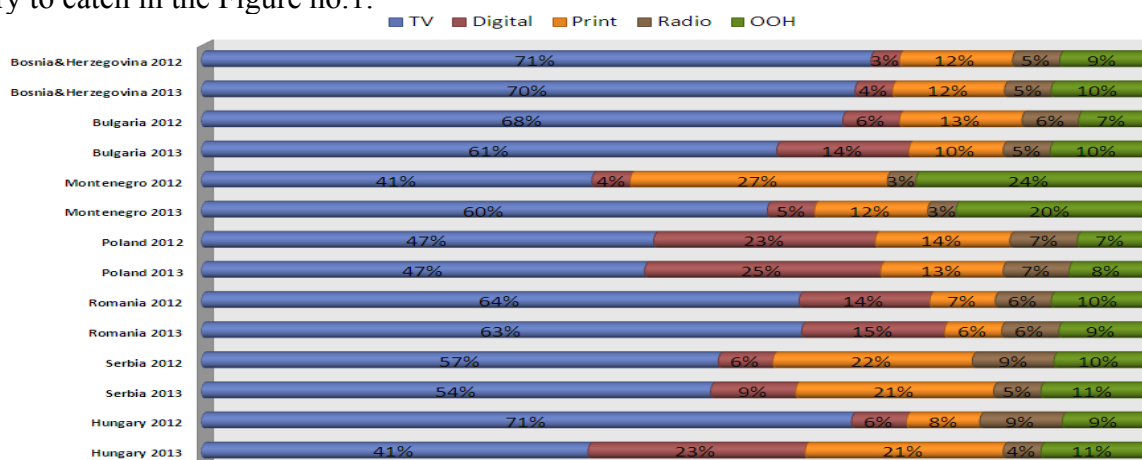


Figure no.1. Percentage shares of the advertising market according to the channel used for distributing information in Romania and the surrounding countries

Source: Authors' representation based on Media FactBooks data, Romania, 2013 and 2014

It seems that in Romania, but also in the surrounding countries, between 2012 and 2013 it was registered a growth of the incomes gained from mass-media advertising distributed on internet and a decrease of other mass-media versions. In Romania we observe a 1% growth of the incomes gained from internet distributed advertisement while we have a 1% decrease in TV distributed advertising. The decrease tendency is also observed regarding printed publications of 1%, while radio maintains its revenue shares of 6% drawn by advertising in 2012 as well as 2013. In Hungary the change is much bigger, according to Media FactBook data we have a growth of the incomes gained from internet distributed advertising of 6% in 2012 to 23% in 2013 and a decrease from 71% to 41% of advertising drawn by TV sector. In Hungary we observe as well an important decrease of the incomes obtained by the radio from 9% in 2012 to 4% in 2013 and a growth of the incomes gained by the newspapers from 8% in 2012 to 21% in 2013. Regarding Bulgaria, our neighbors from the south, we observe an important step ahead of the incomes gained from internet distributed advertising from 6% in 2012 to 14% in 2013, detrimental to television which drops off from 68% in 2012 to 61% in 2013. In Bulgaria, the decrease tendency of the incomes gained from publicity maintains on all traditional mass-media segments, a drop of 3% of the incomes obtained by printed publications and a drop of 1% regarding radio. In Poland, it seems that television and radio maintain their revenues shares on publicity market, 47% TV and 7% radio but the incomes obtained from printed publicity drops off with one percent between 2012 and 2013.

We can notice overall an encouraging evolution regarding the access and the consumption of media content on internet, that changed media audiovisual landscape; we could also affirm that remains a very large space for improvement, growth and development.

3. THE INTERNET: AN AMPLENESS ECONOMICAL PROJECT

The internet transformed the communication world and the media industry. Even if it started as a research project, it grew as an „economically successful project with billions of euros invested annually” (Barry et al, 1997). At the beginning of 2014, while one of the authors was shopping at an important store, an „internet blackout” appeared; all cash registers were blocked and all the buyers were asked to live their product baskets and get out. If the internet didn’t work, the filming system was down as well, surveillance-security, they couldn’t make any receipts through the bank and the stock products could not be held any more. When the internet is inoperative, the banks are unable to make any operations. If we imagine a day without the internet, it would be with jams, accidents, and huge economic losses. Think what it would mean for a television newsroom, radio, newspaper and the „*new media*” the computers and the internet to disappear: the work would be paralyzed; information, which are now collected in a few minutes would be gathered in a few days; the work a person is making now would have to be complemented by dozens of people. We would have to write by hand or by typewriters...But this is just an imagination exercise, not to forget where we started!

3.1. INTERNET EXPANSION AT A GLOBAL LEVEL

Just 40 years ago, in 1974, only a few thousand people were connected to a rudimentary version of internet. The increasing number of internet users worldwide was slow at the beginning: it took 16 years to reach a penetration rate of 0.5%. Only in 1996 the number of internet users exceeded 1% of the world population. Internet expansion occurs after year 2000, the number of people connected to the Internet reached from one billion in 2005, to two billion in 2010 and to 2.7 billion in 2013, namely 38.49% of the world population. The chart below captures this dramatic increase.

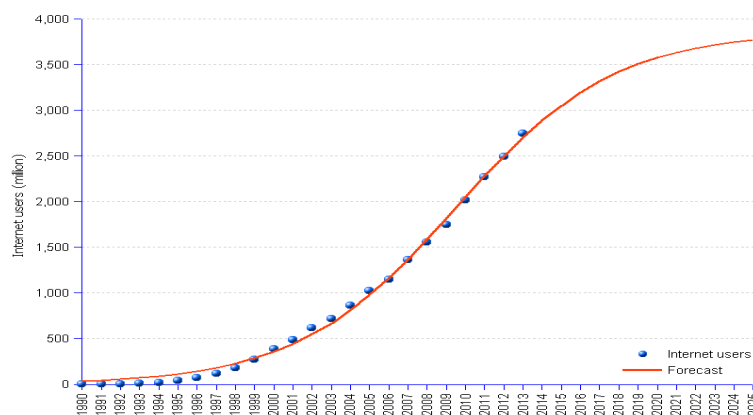


Figure no.2. The increase of internet users at global level

Source: Authors' processing based on the AREPPIM data

The data presented in Figure 2 shows us that between 1990 and 2010 the increase of the number of internet users was exponential, with an average annual rate of 35.27%. After 2010, the increase is still important, but we can notice a slowdown. This slowdown does not seem to be caused by the economic crisis after 2008, but rather by the saturation in the developed countries and by the lack of economic development in other areas. This situation it seems that will accentuate the differences between those that have internet access and those who don't benefit of this facility. As Ulmeanu (2011) states,

„Revolution, even if its political, technological, social or any other nature, it is a fundamental change that happens in a relatively short period of time. The internet itself represents such a fundamental change, visible among other by the way we communicate to each other, in the way businesses work, in the collapse of mass-media business model, etc. The internet became, from a computer network, a human beings network.”

Moreover, the economy of persons, societies and nations gravitates around internet. Affairs relationships, commercial trades, financial transfers, information about new affairs opportunities are depending on the internet. This modern communication instrument not only that facilitates affairs relationships, but itself it is a business with a significant economic contribution. Indeed, „Internet is in the center of cross-borders services, and the contribution of the internet in the economy of the European Union it is expected to grow from 3,8% of the gross domestic product (GDP) in 2010 to 5.7 in 2016” (Digital Agenda 2011).

3.2. INTERNET EXPANSION IN ROMANIA

In Romania, according to the data presented by the National Authority for Administration and Regulation in Communications, there are 12 million internet connections. Among these, 3.8 million are fix points connections and 8.1 million are mobile points connections. The growth was spectacular, as in 1993 there were only 850 internet connections and in 1997, when joining European Union, the number of internet connections raised to 100.000.

As revealed by Ban (2006), her research proved that for the year 2005, the preferred environment for advertising is no longer classic media but the internet and new communication channels.

During recent years, both quantitative and qualitative growth of internet services has occurred. This growth is determined by the economic interests on this market, the economic potential development and the national and international policies that aim digital networking and convergence. In the next figure we present the latest developments of the internet networks in Romania.

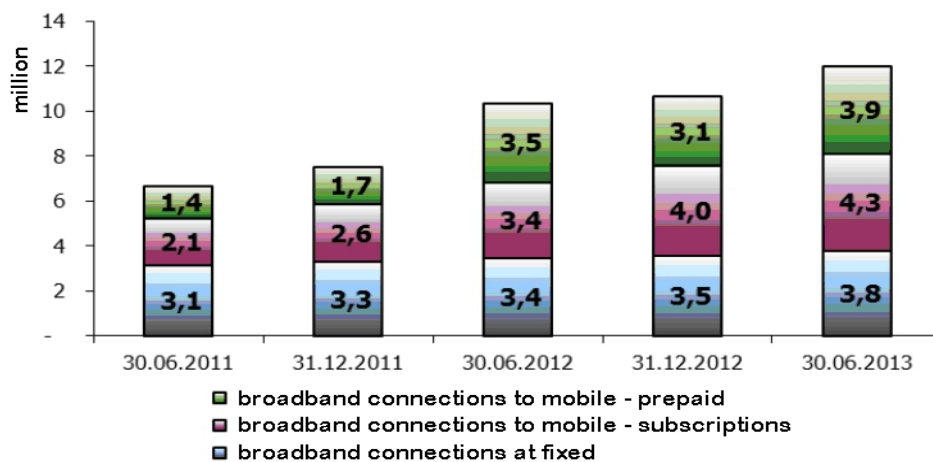


Figure no.3. The structure of the internet connections number according to the way of connecting in the period 30.06.2011 - 30.06.2013

Source: Authors' representation based on the data provided by ANCOM

We can notice in Figure 3 the obvious tendency of interest growth regarding mobile technologies and a lent growth in the number of fixed point's connections. Between 2011-2013, the connections of fixed numbers raised with 700,000 units, while the mobile connections raised with 4,600,000 units.

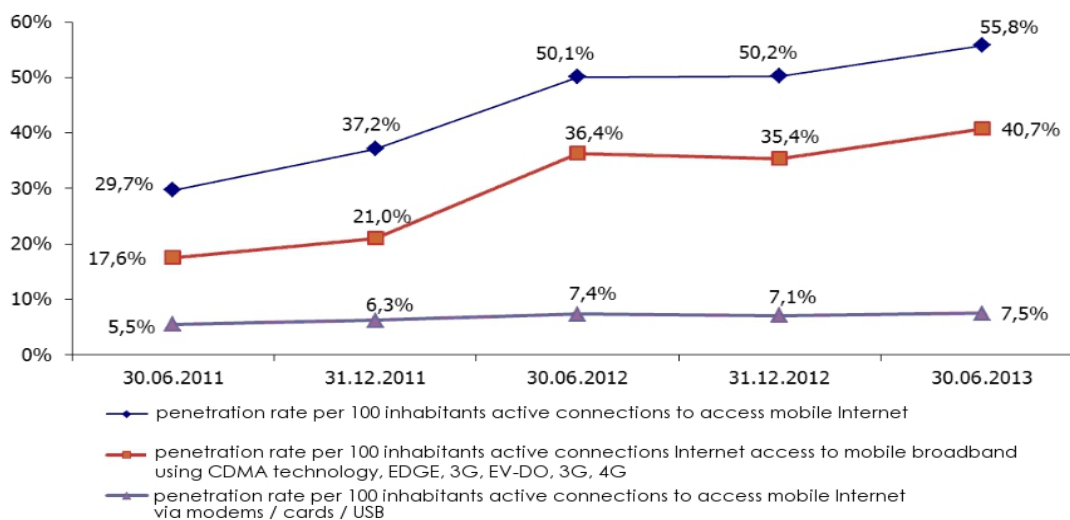


Figure no.4. The evolution of the penetration rate of 100 peoples internet active connections provided at mobile points in the period 30.06.2011 - 30.06.2013

Source: Authors' representation based on the data provided by ANCOM

Figure 4 represents the actual situation: 55.8% of the Romanian population has got access to the internet by mobile connection, but only 40.7% has access to mobile internet. Talking about these mobile connections, no matter if it's on prepaid cartels or subscriptions, the packages are in fact very limited. Only 7.5% of the Romanian people benefit of a truly stable internet connection on a large scale. No matter if it's a large scale connection or not, at a global level the internet revolutionized the computers world, the communications and mass-media. Internet is an environment where information is disseminated, where you can find a collaboration and interaction between individuals and their computers, overcoming the spatial-temporal boundaries. This brings changes, economic development, increase of the well-being and the quality of life.

4. THE ROLE OF THE INTERNET IN MEDIA ECONOMY AND INDUSTRY

The internet is more and more present in media industry. In 2014, almost 3 billion of the people on Terra are equipped with computers, modems, cellular phones, cable systems that facilitates the internet connection. All these digital instruments seem indispensable to the modern man. Withal, the permanent development of these communication systems knew a qualitative and quantitative jump. According to the law of Moore, microprocessors double their performance each 18 months, while the price goes down to half. Economically speaking, the profit and the benefits don't come late. But changes almost never come without complications. As McLuhan and Zingrone (1995) state „every new technology creates an environment considered corrupt and degrading; however, the new environment transform its predecessor into a new form of art” This transformation is so radical that every new technology changes not only the image but also the frame. By the intrusion of the computers and the internet in mass-media, says McLuhan, „we head to *household economy*, because industrial activities of maximum importance could evolve in any individual home, anywhere on the globe.” (McLuhan and Zingrone, 1995). The internet and the world of computers changed the frame, the message, the image and the economy of mass media. We have today a totally different logic, the journalists can work in their bedroom, they can interview people from other continents, and all these will be available to publish almost instantly. Due to the internet, there is no needs to move in order to find information because information is brought were the people are. This new world of the internet bring s the nostalgia of the times when newspaper was edited on the typewriter, printed in the typographic industries with thousands of employees and distributed in the markets, at the traffic lights, in kiosks or brought by the post man. The internet brings a „vintage” light on the classic mass-media. But this new world of the internet changes mass-media economy, because the market is divining more and more, and the consumers have extreme diverse offers they can find in their proximity.

4.1. MASS-MEDIA MARKET IMBALANCED BY THE OFFER

The dynamics of supply and demand is slightly imbalanced in terms of media products and services in the digital world. If the initial offer came as a response to market demand, we discover today that the offer took over the scene having the hope of finding costumers to take over these offers. Media industry in fact aligns to the general tendency of the market. As Paul Krugman (2009) shows, „during the last decades, the focus of economic thought constantly diverted from the demand side to the supply side of the economy”. In the last decades the economy generally offered on the market more than was the demand. That inevitably led to imbalances. Regarding mass-media, the sector that invaded the market was the internet. On-line mass-media offers grew strongly in the recent years, due to the rapid spread of the digital platforms.

It seems that now, most users don't replace a platform with another; instead, mass-media services utilizars use platforms to access these market offers. So, „54% of those who use the tablet, use the smartphone as well; 77% also use a laptop or a desktop computer; 50% of the mass-media services utilizars use all five platforms (TV, radio, newspapers, mobile and computers)” (Krugman, 2009). Thomas Friedman, talking about this situation, says that „the world became more and more interconnected, and today no matter if it's about a country or a company, the threats and the opportunities come from the ones you are connected with” (Friedman, 2008). All the wings of the economy and industry had been affected on a way or another by the internet. Of all these, it seems that media industry was the one who benefited the most of the communications technologies innovations. Paradoxically, the produced changes in media industry led to a transformation of this kind of business regarding the way of production, distribution and also regarding the financial-economic aspect. Ulmeanu (2011) states:

„Brought together by interests, age or common occupation, the intelligent crowds use the wonders of technology to stay connected and to make themselves a better live. Nobody

wants to be excluded from these communities, so, intelligent phones, computers and PDA's help people to integrate and to learn from one another."

We have a global broadcasting system as well as a mechanism for the dissemination of information, but we also have an appropriate collaboration and interaction environment between persons or institutions, that easily overcome the impediments of geographic localization. „In the informational society, the internationalization of the communication becomes a more extensive phenomena, being a direct consequence of the new technologies and media industries spread" (Ferguson, 1992).

4.2. THE INTERNET AND DIGITALIZATION: SOURCES OF GROWTH FOR MASS-MEDIA ECONOMY

The role of the internet in the economic life is increasingly important. Regarding mass-media market as well as the market of goods and services, on-line trade became a more important part of the economy of affairs. Leiner (1997) affirms:

„Internet represents one of the most successful examples of benefits brought by investments and a commitment for the research and the development of the informational infrastructure. Starting with the first researches, the government, the industry and the academic environment had been partners in the change and in the implementation of this new and interesting technology."

This partnership of the political world with the academic world, combined with the economic pragmatism, brought through the internet important benefits for mankind. Internet can play an important role in the economic development of the European Union. The contribution of on-line services and economy has a cross-border nature and it can accelerate the European integration and creating the single market (COM 2011/ 942 final). In fact, global economy is strongly stimulated by the contribution of internet, regarding direct incomes that internet generate, as well as the collateral incomes and advantages that arise from on-line services utilization.

Boston Consulting Group (BCG) analyzed from the economic point of view the impact of the internet in the member countries of G20. According to the data presented by the BCG (see Figure 5), the internet economy of G20 countries represented in 2010, 4.1% of the GDI, namely 2,300 billion USD, and in 2016 it is estimated to reach 5.3% with a total value of 4,300 billion USD. In these developed markets. the economy of the internet it is estimated to reach a growth of 8% per year, being the sector with the most spectacular growth. BCG report shows that in the European Union the economy of the internet represented 3.8% of the GDI in 2010, and the estimations indicate a growth. The internet economy in EU in 2016 it is expected to reach 5.7% of the GDI. BCG data demonstrate that the role of the internet it's not just about creating connections between people and accelerating the globalization process, but has also economic value, the internet becoming one of the most important vector for the economic growth.

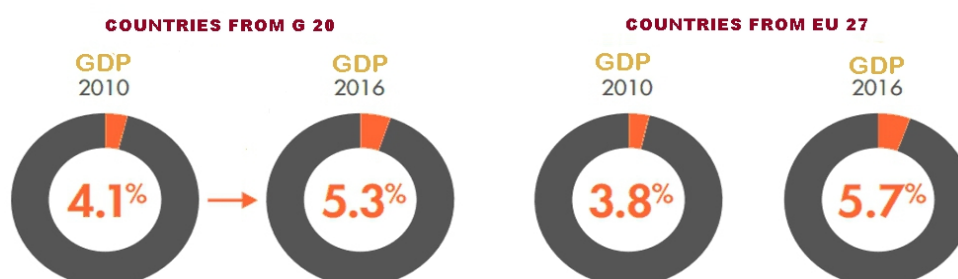


Figure no.5. GDI internet contribution in the G20 countries economy and EU 27

Source: Authors' representation based on the data provided by the report of Boston Consulting Group.

Mass-media industry is a part of this picture because internet and digitalization are the main sources for the economic growth of mass-media. A realignment of mass-media economy in creative economy frame will bring, hopefully, the possibility of developing this sector and realigning it in the new communication environment offered by modern technology. Apparently we are on a road

not so easy to cross, although thanks to this technological instruments the globe „diminished”; but, „it is better not to be so glad that through media the globe diminished, because we ended up living in a „global village”, where every human (collectivity) knows about the other one” (Preda, 2006). Always the greatest benefits are balanced by danger and challenges, and when we talk about internet, these are high. We have a world connected by billions of invisible wires that are more and more like a labyrinth and one day order will have to be made. Internet managed to connect computers to each other, this way the users, man, are interconnected. The change of messages accumulated the volume of information that grew exponentially. Browsing the internet through billions of pages without digitalization would have transformed the internet into the „Tower of Babel”.

5. CONCLUSIONS

Preparing for the future, it is essential to understand the bits fluxions. Those who create media content, as well as leadership factors, programmer schedule producers, the „gatekeepers”, will have to adapt to the new conditions. In the digital world, the market will be different: receivers will have not only 50 TV channels but 5.000 or maybe 50.000! They won't have just 5 daily newspapers to choose of, but thousands and tens of thousands! There will not be just 20 radio stations to pick up in the car, but 20.000! For each show it will be known the exact audience, the rating of the compere, what offers there are on the same product segment in the other part of the world. The discussions about the audience surveys determined by the establishment of publicity price list will be over, because in the digital system we will know the audience every moment. Mass-media consumers will be able to realize their own programs list chosen from an unlimited number of offers and possible choices.

The opinion we head on to is that the European Union, Romania being part of it, is characterized by cultural and linguistic diversity, fact that may be a competitive advantage on the global market, in an environment that remarks through networking effects. The network effects from digital mass-media universe and the internet may offer an important advantage.

Mass-media sector in the digital world face opportunities and challenges. The change it is not simple or without risks, maybe it's expensive but it may be the only way of survival for each of the societies is this sector. In order to build a successful business in media industry, as well as in other sectors, the main characteristic has to be sustainable growth. Sustainable growth, predictability and ascended economic evolution are possible only bearing in mind the context in which the organization works. Adapting the press organization, the external environment, the creative response to the market challenges and optimal management of the financial capital, especially the immaterial one, are some of the challenges of the societies involved in mass-media in the digital era.

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