

Changes



Developments

of the Electronic

Media in the 21st

Century

2001

CHINA COMMUNICATION FORUM

中国传播论坛

变动中的全球广播电视

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Preface

卷首语

自从上帝变乱人类语言,使得第一个"全球化"的产物巴别塔半途而废之后,人类从未放弃再度联合的可能。其间有航海、贸易、外交、取经,也有连绵的烽火和难解难分的信仰之争。在这里,"语言"的变乱成了人类史隐喻中一个标志性的事件,它造成了难以填平的理解鸿沟,使时间更断断续续,使空间更支离破碎,同时也引发了不绝的试图超越鸿沟的行动,从而导致媒介的诞生。

在一个号称全球化已经到来的时代,现代化的大众传播媒介联结起全球村落或曰全球都市,我们是否可以忽略语言的隔阂?这里的语言,不仅指汉语、英语、阿拉伯语或非洲的土著语言,更是指人类在相互交流时使用的各种各样话语的符号体系。它的隔阂不仅在于符号工具的差异,更在于人们能否建立通畅而有效的交流平台。大众传媒本是一个重要的交流场所,可即使在它的内部也有种种阻碍和区隔。中国加入WTO是交融的一个重要开端,但在媒介领域,跨国媒介集团和新新睁眼看世界的国内媒介之间,国内的各级和各类媒介之间,媒介的管理者、从业者、研究者之间,媒介与受众之间,都因为种种的政治经济、历史文化因素而未能将交流和沟通进行到底。

由北京广播学院广播电视研究中心组织的"中国传播论坛年会"以及会议论文结集而成的年刊,是我们试图在媒介领域内部,尤其是在中国广播电视媒介领域内部塑造一个交流平台而作出的努力。广播电视研究中心作为全国人文社会科学百个重点研究基地之一,依托中国广播电视研究与教育的最高学府北京广播学院,拥有雄厚的学术力量和坚实的科研条件,更重要的是,我们拥有一个外达世界各国,内及全国各地,囊括学界与业界重要力量的广泛联系网。我们希望,也有充足的条件为来自媒介领域各方面的人士提供交流的机会和空间。2001年9月,首届中国传播论坛年会在

北京成功举行,来自英国、美国、加拿大和国内各地的学者与业者作了精彩演讲,围绕"变动中的全球广播电视"的主题展开了热烈的对话和讨论。这是一个良好的开端。首辑年刊就是这次年会的一个结晶。

本次会议的主题是"变动中的全球广播电视"。在全球范围内摸清广播电视领域的宏观发展脉络已属不易,更何况在当代中国,广播电视正逐步脱离单一的宣传工具的身份,将拥有信息传播者、舆论引导者、文化教养者和重要的产业经济部门等多重身份,并且外临跨国媒介的竞争压力,内遭大众文化浪潮之冲击,时刻处于变动不居的状态。在广播电视传播观念与理论、节目的创作与文化意味、广电媒介投资与产业运营管理诸方面,问题多,能引发人讨论的兴趣点亦不少。本次会议强调"交流",首先是主题发言,随后与会者们分三个部分展开了对话。

第一个部分为"主题发言——全球媒介的发展趋势"。紧扣宏观话题,六位重量级的国内外媒介高层人士和专家学者对广播电视的现状和未来进行了高屋建瓴的审视和预测。

第二部分是"中外学者对话专场——媒介全球化进程中的学理探讨"。英国、加拿大的学者与国内高校的学者就中外媒介研究的现状各抒己见。从中外学者的对话中可以看出政治经济学在传播与媒介研究中的巨大影响,同时中国学者也对各种"舶来理论"进行总结并作了本土化的尝试。然而,中国的媒介研究仍然带有浓厚的"出谋划策式"传统,与西方学者相比,批判研究稍嫌落后。

第三部分以"媒介与市场对话专场——竞争、整合与资本"为主题。媒介领域的产业化运作和集团化道路是实践中的热点,也是本次会议讨论的焦点之一。学者们对市场作了全面的描绘,提出的体制问题切中肯綮,同时提供了具有可行性的理论模型。业界人士也从实践出发,探讨媒介集团化的发展规律和体制革新问题。而从更广泛的政治经济和社会关系角度对产业化的可能弊端进行的探讨仍需进一步展开。

最后举行的是"理论与实务对话专场——文化、变革与创新"。在资本逻辑逐步掌控广播电视节目生产命脉之后,文化滑坡是否是必然之路?有的论者从类型化、频道设计等方面探讨"节目精品"的创作,有的论者在审美观念上力图创新,还有的论者则运用符号学和后现代主义理论揭示了影像背后的"无限量能指"。

进入 21 世纪,历史进程连绵不断。广播电视的商品化、集中化、全球化及与之对应而生的公共领域、非主流媒介和本土抗争在世界各国包括中国的各个角落明生暗长,学界的推动与批判也随之不断开拓空间。议题丛生,交流更显重要。第一届年会虽不免于缺憾,毕竟开了个好头,既然如此,我们就与时俱进,把中国传播论坛年会建成一个常设的交流平台。目前第二届年会"中国电视剧论坛"已于 2002 年末举行。为了避免一年一度的工作可能遭遇到的重复与停滞,我们更希望与读者展开对话和交流,如有意见、建议,请不吝指教,万分忻幸。

1

目 录

Table of Contents

卷首语

Preface

主题发言——全球媒介的发展趋势

Topic Speech—the Trend of Global Media

变化中的媒介结构与内容:是否削弱了信息性和政治性角色? /Ralph Negrine 2 Changing Structures and Contents of Media: Does It Weaken the Media's Informational and Political Role? /Ralph Negrine 数字媒介的未来与媒体监管 /菲尔·哈丁 18 The Future of Digital Media and Regulation /Philip Harding 两台合并与网络化后的业务方向及经营模式 /罗百鸿 23 The Managing Trends and Model after the Recent Reform of China's TV Broadcasting Industry /Tony Law 从点状结构逐步向网状结构转变——关于我国广播电视集团发展的若干思考 /陈乾年 26 From Dot Structure to Network Structure: Some Thoughts on China Radio & TV Group /Chen Qiannian 新世纪广播影视集团改革的思考 /曾凡安 35 On the Reform of Radio, Film & TV Group in the New Century /Zeng Fan' an 中国广播电视集团化进程中的瓶颈与出路 /胡正荣 44 Issues of Media Transition in Contemporary China /Hu Zhengrong

中外学者对话专场——媒介全球化进程中的学理探讨

Dialogue between Scholars—Theoretical Discussion on Media Globalization

因特网对现有媒介的冲击 /柯林·史帕克斯 52 The Impact of the Internet on the Existing Media /Colin Sparks 加拿大报纸中的种族再现问题 /Ross Perigoe 66 The Question of Race as Represented in Canadian Newspapers /Ross Perigoe 自律原则对网络传播的适用性——美国电视儿童广告规约与网上隐私权保护规约的效果比较 /罗以澄 夏倩芳 74 The Applicability of Self-regulation on the Internet /Luo Yicheng, Xia Qianfang 传播政治经济学之我见 /郭镇之 83 My Understanding of Communication Economics /Guo Zhenzhi 信息传播中的全球化与本土化的悖论 /陈卫星 92 The Paradox between Globalization and Localization of Information Communication /Chen Weixing 传者的自组织传播行为及其特点 /张英华 97 The Communicator's Self - organization Communication Action and Its Traits /Zhang Yinghua

媒介与市场对话专场——竞争、整合与资本

Dialogue on Media vs Market—Competition, Convergence and Capital

数字电视,一种美国视野 /约翰·帕弗里克 102 Digital Television: a U. S. Perspective /John, V. Pavlik 全球化背景下中国广电业的市场重组:特征与矛盾 /陆 晔 夏 宁 112 Characteristics and Conflicts: the Reorganization of the China's Broadcasting Industry /Lu Ye, Xia Ning 对于我国媒体产业现实发展状况的基本判断 /喻国明 118 Basic Judgement of the Developing Situation of Chinese Media Industry

WTO 与媒介整合 /熊澄宇 何冬梅 123

/Yu Guomina

WTO and the Media Integration /Xiong Chengyu, He Dongmei 解读中国电视业的三个命题 /陆兴东 131

Three Propositions of Analysing the Chinese Television Industry /Lu Xingdong

环球化 "传媒超市":传媒在 "狼与羊" 时代的新型生存方式 /博 扬 136 Global "Media Supermarket":The New Model for Surviving and Success of Media in the Era of "Wolf and Sheep" /Bo Yang 新世纪电视媒体经营的市场化冲击 /陈培爱 141 The Impact of Commercialization on Television Management in the New Century /Chen Peiai 我国广播电视的集团化运作与思考 /石长顺 145 Group ─ running of China Radio & TV and Its Reflection /Shi Changshun 美国政府对有线电视的规制——演变和发展趋势 /王宇丽 154 Evolution and Trends:U. S. Government Regulation of Cable Television

理论与实务对话专场——文化、变革与创新

Dialogue Between Theory and Practice—Culture, Change and Innovation

/Wang Yuli

电视广告的社会文本解读 /吴文虎 162 Understanding the Television Advertisement as Social Text /Wu Wenhu 论 21 世纪的电视审美 /张群力 168 Television Aesthetics in the 21st Century /Zhang Qunli 初见端倪,任重而道远——从《财富中国》及《娱乐现场》节目的发展透析中国电视节目类 /刘 智 176 On TV Program Classification: through an Analysis of Fortune China and Entertainment /Liu Zhi 交互主体性的回归——网络虚拟空间的人际传播 /刘仁圣 186 The Return of Cross - subjectivity: Interpersonal Communication in Cyberspace /Liu Rensheng 大银幕与小荧屏——论西方纪录片史上的影视之争 /单万里 193 Big Screen vs. the Small Screen: Contention between Cinema and Television in the Western Documentary History /Shan Wanli 21 世纪需要什么样的电视新闻理念——CCTV 新闻频道设计构想 /展 江 李 勇 余敬中 201 Example of a TV News Concept Needed in the 21st Century: CCTV News Channel **Format** /Zhan Jiang, Li Yong, Yu Jingzhong

Changing Structures and Contents of Media: Does It Weaken the Media's Informational and Political Role?

变化中的媒介结构与内容:是否削弱了信息性和政治性角色?

O Ralph Negrine

It is always dangerous to generalise from the experience of one country or even a group of countries, but it is sometimes useful to look at other countries in order to properly assess the options or choices that may be available to others. In the case of the media environment, I would like to suggest that there are some changes that have taken place in the European context that one might like to consider as indications of patterns of change. These would include — and this is not intended to be a sequential list — (i) the general trend towards deregulation and liberalisation and the consequences of such a trend, (ii) the transition from scarcity to multiplicity and the consequent fragmentation of the audience, and (iii) the changing menu of content that both these trends have brought about.

This list is deceptively short but it does contain, almost implicitly, an account of significant transformations in the communications landscape, particularly in the electronic media. I would like to touch on these transformations at the very start of my paper because they set the context for much of what I am going to discuss later on. Following an account of this context, I would like to move on to discuss, firstly, the changes that have taken place in the media coverage of political systems that may be impacting on its health, secondly and more briefly, the interest in the internet both as a new medium and also as a medium that will have an enormous impact on 'old' media.

1. Transformations in the communications environment

The major transformations that have taken place in the communications sector have undoubtedly been in respect of television. For a number of complex reasons, including a desire to modernize the economy, the advent of new services via cable and satellite, a desire to make public services more responsive to consumer demands, international competition, and an internationalization or globalization of television markets, broadcasting systems across Europe entered a process of 'deregulation' from the early 1980s onwards. Regulations that had existed, particularly with respect to commercial broadcasters, were relaxed and new ventures in broadcasting found that they could now operate without the sorts or requirements that applied to domestic public or national services. They would not need, for example, to provide national and international news, or current affairs programmes or regional programmes within each single channel or service. This process of 'deregulation' --- often also referred to as liberalisation - has led to different, sometimes stricter but more often less strict, rules being enacted: stricter in as much as quality thresholds might have been introduced, but less strict in as much as things have become easier for the broadcasting companies, for example, in respect of assessing and meeting their own contract requirements. Because regulations have not been completely done away with, it is perhaps more accurate to describe the process that has taken place since the 1980s as one of re - regulation, rather than a total deregulation of the broadcasting structure. In other words, processes of deregulation have usually been controlled in some way or other, and it is rare for the process to be totally uncontrolled.

One of the many consequences of this — and this must be seen in conjunction with the advent of the then new technologies of cable and satellite communications which created pressures for change, as well as facilitating those changes — has been a transformation of the broadcasting environment from a fairly closed, state controlled system characterised by a small number of public broadcasters into a large competitive environment, with different types of services occupying the airwaves: there are now not only many more services, but many of these services serve niche markets. We can see this in the context of Britain.

Just 20 years ago, in 1981, Britain had only three nationally available television services: the licence funded BBC1 and 2, and the commercially funded ITV. Channel Four was launched in 1982 and Rupert Murdoch's Sky Television towards the end of the 1980s. As new services, such as MTV, began to join the Sky Television platform of services, many British television households were transformed from households with a very few television services into ones with multiple channels. With digital television now under development, that transformation will undoubtedly continue.

How can we best illustrate this transformation and what is its importance/ significance? Table 1 shows the changes that have taken place over the last 20 years across a selection of European countries.

Table 1: Number of national TV channels in Europe 1980/1990/1997 *

	1	980	1	990	1997	
and the figure and the second	Public	Commercial	Public	Commercial	Public	Commercial
Belgium	4		4	2	4	4
Denmark	1		2	3	2	
France	3	3	3	3	3	3
Germany	3		4	4	5	9
Greece	2	3		4	3	5
Italy	3		3	6	3	6
Norway	1		1	2	3	
Sweden	2		2		2	3
UK	2	1	2	2	2	3

 \ast Please Note: This table is adapted from McQuail and Siune (1998) . It does not include commercial satellite and cable services that may be significant but reach less than 50% of households. The prime example of this would be some of Rupert Murdoch's Sky television services in the UK.

If that change is of itself interesting — and I shall return to it in a moment — another change that took place across Europe was in respect of the types of systems of broadcasting that were being formed. Here also one can see a shift away from systems in which public broadcasting services were dominant into ones where they are less dominant. (Table 2) As you can see, the television systems of nearly all European countries have been transformed from ones in which a small number of publicly and commercially funded state services existed into ones in which a multiplicity of services exist, of which the vast majority are commercial, each competing for viewers.

Table 2: Typology of national systems (1980/1990/1997)

System	1980	1990	1997		
Public monopoly/ li- cence fee only	Belgium, Denmark, Norway, Sweden				
Public monopoly/ mixed revenue	Greece, Iceland,	Austria, Denmark, Iceland, Ireland, The Netherlands, Portugal, Switzer- land			
Private monopoly/ advertising only	Luxembourg	Luxembourg	Luxembourg		
Dual system	Italy, UK	_	-		

Source: McQuail and Siune (1998: 27)

These broad changes are important because they lead, not surprisingly, to (i) a more competitive media environment which has both an effect on the viability of services as well as on the diversity of content, and (ii) to a fragmentation of the audience.

One can illustrate these two points by returning to the data in the first table (listing the number of new national terrestrial services), but this time I want to provide an updated and more comprehensive set of figures. It is taken from a recent report on the television market in the United Kingdom.

The slope of the graph may be dramatic but it does illustrate the explosion in the number of services currently available. But more telling than the growth in the number of services is the growth in the number of homes that have access to these services, or a good many of them. As the report also observes, "more than 23 million individuals aged four or over (out of a population of 60 million) have access to some form of multi – channel televi-

sion, with satellite remaining the dominant platform." (DGA, 2001: 21)

There are two comments worth making here: The first of these is quite a simple one although it is by no means an unproblematic one. If there are currently some 10 million multi—channel homes, that means that there are about 15 million non—multi—channel homes and that for a variety of reasons a significant sector of the population has decided not to move into the multi—channel era. On one level, one could argue that they are expressing a satisfaction with the available terrestrial analogue choices; at another, they may also be deciding not to opt into the new digital era. In which case, any proposed move to digital for all current analogue services cannot easily take place or cannot take place in the very near future. Proposals for a wholesale switch over to digital television now look immensely problematic; how will the authorities be able to persuade middle—to—low income pensioners, for example, that they really should replace their television sets and subscribe to a digital system so as to take advantage of the new digital formats?

So, the policy implications of the existence of such a large body of non – multi – channel homes are significant. If, as some studies suggest, some $30 \sim 40 \,\%$ of all households appear content with the analogue services and have so far expressed little desire to move into the multichannel era, will a switch over be possible by the end of this decade? If not, what are the implications of this for the future development of digital television?

The second comment I wish to make also contrasts multichannel homes with non – multichannel homes and, in particular, the viewing choices that these disparate groups are making. This time last year, "the terrestrial channels attracted 81.5% of viewing across the country as a whole... but in multi – channel homes the figure fell to 57.1%" (DGA, 2001: 22). In other words, in multi – channel homes, the traditional services lose viewers to the newer ones that have come into existence over the last 15 years or so. None of these services, one should add quickly, necessarily has a particularly large share of the audience but cumulatively they are able to make incursions into the national audience.

This fragmentation of the audience is obviously an indication of both the available diversity of content and the desire of the audience to sample that diversity. But many believe that we may be paying a price for that. That price can be seen in some of the figures just quoted, namely, that in multi – channel homes the share of the terrestrial channels is decreasing. Now, if one adds to this that the terrestrial channels are those that have to fulfil some public service obligations with regards to, for example, news and current affairs coverage, we can begin to see how those in multi – channel homes may be shifting their preferences away from certain types of services and towards others. As the audience of the public broadcasters drops, the legitimacy of, and the case for, public funding of such broadcasting services is questioned. They are then placed in an unenviable situation; if they are to compete head – on with the commercial broadcasters, they cease to be different from them. And if they are no

different from them, why should they be funded differently? But if they do not compete, they risk losing the audience as it drifts to less taxing content. And if they become a 'minority' channel, they also risk losing their public funding. This explains, in part, why public broadcasters are using such data as reach and viewing across periods in their accounts: it helps to show how they are viewed by a large number of people, if not all at the same time.

It is therefore not surprising to find that there is now a discussion — debate would not be an appropriate word — about some of the implications of the changes that have taken place over the last 20 years, particularly with regards to the licence funded BBC (although the national terrestrial services also face similar problems). The fundamental question for the BBC, though, is how it meets the challenges of the next 10 years. How is it going to define its place in this new media landscape? How will it adapt its programme provision? How will it continue to provide services that are universally available? As the European Broadcasting Union's Digital Strategy Group puts it without providing any real answers:

"As a consequence of the new environment, if they (public broadcasters) are to take no action, there is a risk that public service broadcasters will find themselves marginalized, or relegated to simply providing television services for those who cannot afford TV pay. Public service broadcasters must rise to meet the challenges of the new environment. Their present forms will not do. (They need to) adapt themselves in order to play their rightful part in the new media environment." (2001: 6)

These are not questions that only the BBC needs to address, nor that it has to address on its own. The government needs to develop its own strategy towards the broadcasting landscape as a whole and to decide whether or not to commit itself — and the nation — to long—term and adequate funding of public broadcasting services. And all of us concerned with broadcasting in the United Kingdom are aware that what happens to the BBC has a knock—on effect on other broadcasters, as well as on the social, cultural and political scene as a whole.

This plea for some careful handling of these major policy issues is not, I would hope, a plea for going back to another era. It is one based on a belief that public broadcasters may be a little different from commercial broadcasters both in terms of how they perceive their roles but also in terms of how they fulfil their obligations and responsibilities. The expectation, which is not always borne out, is that public broadcasters should play a more active cultural and socially and politically educative and informative role within our societies. they should aim to use the means of communication for some higher goals rather than use broadcasting systems in order to please their commercial masters. This does not mean that commercial enterprises cannot produce or provide things that please and satisfy the audience. There are many examples of commercial enterprises broadening the range of output: sports channels are

one example, music television are another, but there has always been a fear that the commercial imperative would not work to the advantage of things, such as news and current affairs, which have a small number of viewers.

Some of the available data does in fact suggest that when commercial broadcasters do provide similar types of programmes, and news programmes are a good example, and the content of these programmes will differ so confirming that they have different aims and objectives. We can see this from a study we carried out in 1997/8 where we compared the ways in which three different evening news programmes on three different services — BBC1, ITN and Sky News — dealt with political stories. (Table 3)

		•							_
Sample period	9 days	10days	10 days	Total	10 days	9days	10 days	Total	9 days
Total number of pri-	BBC1	ITN	Channel 4		BBC1	ITN	Channel 4		Sky News
mary				111				0.4	27
items	34	31	46	111	30	23	41	94	27
Number of items in first 3		16	21	52	14	10	18	42	9
of bul-		<u> </u>		ĺ					1
letin		<u> </u>	_						}

Table 3 Prominence of primary political news items in four bulletins. (Negrine, 1999)

As this table shows, Sky News — the commercial news service run by BSkyB — places its items in a different order. In fact, Sky News only carried one of the nine items at the top of the news bulletin over the nine days, compared to 4 for ITN and 6 for the BBC. Note, also, that this table does not say anything about the length of items or their treatment. It only gives an outline of the theme I am currently pursuing. These data suggest that, like for like, commercial services are likely to put "hard" news items lower down the running order than non—commercial, public services.

But there is another pattern in these data that also deserves our attention, namely, the general trend away from 'hard' news perse. As Table 3 shows, there were fewer primary political news items in 1996 than there were in 1986. One could easily argue here that the more competitive media environment has led to a move away from 'hard' news in order to retain the audience, except that we are also looking at a much longer trend that is being made worse by the more competitive environment. It is this change in general political coverage that I now wish to turn to.

2. Changes in the media coverage of politics

The pattern in Table 3 is quite clear. But it is a pattern that we can also find in the British press – I want to return to this in a minute – as well as in the general coverage of news and current affairs. Steve Barnett and Emily Seymour have provided us with evidence of a general trend away from the more educative and informative role of the media and towards a more entertainment one. They looked at television programme schedules from the early 1970s through to the late 1990s and they analysed the changes that they found in the categories of programming. In respect of news and current affairs, they summarised their findings as follows:

- Foreign coverage has virtually disappeared from commercial television and is now almost wholly confined to BBC2. On all other channels, a domestic agenda dominates.
- The BBC is becoming the sole repository of political and economic coverage in current affairs.
 - There is less peak time current affairs on ITV than ever before.
- The crime/police theme has risen sharply across all channels over the last ten years. It is now the most frequently featured topic on commercial television.
- There is a general trend towards "softer" issues, particularly crime, consumer moral/ethical themes. (1999: 11)

As Barnett observed, "Given the dire warnings about the damaging effect of channel proliferation and market competition, we tend to the conclusion that the UK has maintained a remarkably robust and broadly serious approach to television news. Partly because of the presence of a well – funded public broadcaster and partly because of the regulatory obligations which allowed a strong commercial competitor to flourish. Viewers of mass audience channels still have access to serious coverage of important domestic and foreign issues, alongside a reasonable proportion of lighter, more tabloid issues." (Press launch, 1999)

By implication, without those 'well – funded public broadcasters' and without that regulatory framework, those things would not exist as they do now. Once again, we come back to the much broader concern about how we can design, plan or shape our media land-scape in order to create a framework for a vibrant and lively cultural and political environment. But as more and more of the electronic media move out of government regulatory mechanisms, that ability to shape that framework lessens. Indeed, as the media environment globalizes – in terms of trade, alliances, ownership – it becomes easier to shape that framework: there are too many inter – connecting influences coming to bear on each and every decision.