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Comparative Trends In Television Broadcasting
In Taiwan, Thailand And Australia

By

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Comparative Trends in Television Broadcasting in Taiwan, Thailand and Australia


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Comparative Trends in Television Broadcasting in Taiwan, Thailand and Australia

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The rapid spread of direct satellite and cable broadcasting has made it difficult for policy makers and scholars to keep up with the pace of change. This feature of technology change setting the agenda for public debates about communication is not new; rather, it is one of its distinguishing characteristics. This paper will survey some of the recent broadcasting trends in three Asia-Pacific countries - Thailand, Taiwan, and Australia - with particular reference to the policy dilemmas the new television systems have highlighted. Its underlying concern, however, is to raise questions about what directions a comparative theory of international broadcasting trends might pursue.

Comparative studies seem to be better established in other branches of the social sciences and humanities than in communication studies. There are strong traditions of comparative analysis, for instance, in political science, public administration, in historical studies, and in management. Several major contributions have been made in the communication field, notably the longitudinal study of Edelstein, Ito and Kepplinger (1989). However this paper will seek to adapt and apply the perspectives of first, Hallin and Mancini (1994), and second, Dutton and Blumler (1989), to the development of new broadcasting systems in the Asia-Pacific region, an area in which there appears to have been little comparative analysis (e.g., Blackburn, 1976).

Hallin and Mancini make a careful comparison of television reporting of political news in Italy and the US. Their aim is to study the construction of the public sphere by television news in both countries, following the Habermasian concept of the public sphere as a zone where communicative dialog should take place in the formation of public opinion (Hallin, 1994). This concern about the public sphere is secondary in Dutton and Blumler's approach (1989: 63) and their subject is new information technologies, not television. It does correspond to an extent, however, to their emphasis on the importance of determining the locus of control in the formation of national communications policies. In addition, Dutton and Blumler suggest two other
aspects of national communication policies that need analysis. These are first, the scale of media systems, and, second, the priority those policies give to competing national values. The national values they identify are - the future vision of an information society; the idea of media being used to promote national economic interests internationally; meeting community needs and goals; and fourth, to make a profit.

Accordingly, this paper will compare recent trends in television broadcasting in the chosen countries in terms of three main dimensions - the scale of their television systems, the national priorities given to competing values, and the ways in which those systems interact with the public sphere in the formation of public opinion. The rationale for the choice of these three countries is that it represents the researcher's knowledge of regional broadcasting systems. All three countries are relatively small but important powers in the Asia-Pacific region compared with the super powers, the US, Japan and China. Yet one commonality they share is that each both sees itself, and to an extent is seen by other nations, as an important potential springboard to other markets in the region.

Taiwan: The Legalisation of the Long-Ilegal Cable TV Industry

The institutional development of television broadcasting in Taiwan was asynchronous with its legislative regulation from its beginnings. The three state-controlled channels were established in 1962 (TTV, Taiwan Television Enterprise), 1969 (CTV, China Television Company), and in 1971 (CTS, China Television Service), but the national Broadcasting Law was not passed until 1976. Although no formal legislative framework existed for the establishment of television broadcasting in Taiwan, there was firm de facto control exercised by the KMT (Kuomintang) and the provincial government. TTV was 49% controlled by the government, CTV was 60% controlled by the BCC (Broadcasting Corporation of China) the KMT agency which already oversaw domestic and overseas radio services, and CTS was 57% controlled by the Ministry of Defence (Wei, 1993).

Despite this firm controlled exercised over the stations, the government was concerned as well to distinguish itself from the centralist media system of the PRC. It was also influenced by the US free enterprise broadcasting model because of its economic and military dependence on America. Consequently, a range of different private investors and semi-government groups were involved from the outset in the three stations. This mixed pattern of public and private ownership produced a broadcasting framework that was under the clear political control of the government and the KMT, but that legally was relatively free-standing. All three stations were registered as private companies, not as government enterprises. C.C. Lee has described the Taiwanese system as a 'bureaucratic-commercial complex' (Lee, 1987: 186).
These historical origins of television in Taiwan suggest that it was a uniquely Taiwanese system. It was distinctive either in terms of its regional neighbours, such as Hong Kong, the PRC, and Japan, or compared with American or European precedents. The traditional public/private institutional divisions common in European and Australian and New Zealand broadcasting did not apply to Taiwan. Public and private involvement was instead bundled up together in the Taiwanese system. It was not a rigidly authoritarian system, as in the PRC, but it was still a largely authoritarian system that conveyed official views, despite the involvement of a range of private interests.

With the moves towards democratisation in the 1980s and the growing internationalisation of the economy, Taiwan embarked on its slower version of Western deregulatory policies. The driving economic force here was US pressure to lower import barriers and observe international copyright laws. Special pressure was brought to bear in 1985 by US tobacco companies through Section 301 of the US Trade Act to force Taiwan to open its markets (Kelly and London, 1991: 222). Political pressures for domestic reform also were mounting. A genuine opposition party to the KMT, the DPP (Democratic Progressive Party), was formed in August 1986, martial law was lifted in 1987, President Chiang Ching-kuo died in 1988, and new newspapers were allowed to be published from January 1, 1988 (Lo, 1992).

However, Taiwan was still different. When telecommunications deregulation began in the early 1990s, the model was not that of Japan's NTT or US Bell, but the local state-owned China Steel Corporation (Liu, 1992). So international movements towards privatization and deregulation had a lesser impact on Taiwan. The major example of television deregulation that finally took place, for example, was more a case of re-regulation. In November 1993, according to temporary regulations governing cable TV systems, the Government Information Office asked the Fourth Channel operators (the Taiwan term for its illegal cable operators) to register their businesses, guaranteeing that those who registered would be exempt from prosecution for illegal services. A total of some 600 cable systems did so subsequently.

The Fourth Channel, which began in the late 1970s, was the only serious alternative to the state television system. CATV services existed after 1979, as did some Public Television broadcasting after 1984, but the former was only a re-broadcast service of the state programs, while Public TV merely piggy-backed programs onto the main channels in down-time, especially on CTS. The Fourth Channel, in contrast, broadcast unregulated content, first via videos, then later by re-transmitting overseas DBS signals from Japan and Hong Kong. These cable operators had no links with the existing CATV operators.
Reception of the Fourth Channel was by coaxial cable, through which viewers received the signal on their home video channel. The initial cable installation cost was AS$80 plus a monthly charge of some AS$28. The Fourth Channel was therefore a program distribution, not a production service, yet it proved popular as an alternative to the state programs. Despite a vigorous anti-Fourth Channel campaign by the government between 1983 and 1988, during which thousands of illegal cables were located and cut, by early 1994 there were some 600 Fourth Channel systems serving an estimated two million households, or about 40% of Taiwan's total television households (Hsiung, 1994; Lin, 1992).

In attempting to come to terms with the popularity of the illegal Fourth Channel after initially ignoring it, then failing to stamp it out, the government moved to incorporate it through new legislation for cable TV services. Cable TV had been recommended to the government by a commissioned Warner-AMEX study in 1985, and initial legislation to establish it had been drawn up in 1989 and 1992 (Wei, 1993: 206-209). In July 1993 the new Cable TV Law finally was passed. This provided for fifty-two cable TV districts nationally with up to five cable operators in each - a condition criticised as economically unviable by several existing operators. The original plans drawn up by an expert panel also had recommended only one operator per district (Wang, 1994).

The legislation's main conditions were that no foreign ownership was allowed; no cross-ownership with existing media was permitted; that individuals could not own more than 10% of stock, or more than 20% via family members; that 20% of programs should be locally produced; that 10% of time had to be given to public service and educational broadcasting; that adult programs could be shown only on coded channels or late at night; that 2% of operators' revenues had to go to local government and 1% to public television; that advertising could be no more than one-tenth of any program; and lastly, that contracts between stations, subscribers and viewers had to be approved annually, while operators' licences were for nine years (CTV Law, 1993).

In retrospect, the confusion and ad hoc approach to the regulation of the Fourth Channel may be explained both in domestic and internationally comparative terms. Domestically, though the KMT and the government exercised firm political control over the television industry, there already had been an initial period when broadcasting had grown without any clear regulation between 1962 and 1976. It took fourteen years after the establishment of TTV for the Broadcasting Law of 1976 to be passed. Probably the government was more concerned with other pressing economic and social policy issues and broadcast media regulation was a relatively minor concern. By the mid-1980s, it was probably the imminence of major political reforms that made the cable-TV issues relatively minor (Lin, 1991). There is
also the possibility that policy-makers saw the growing effects of technological convergence as a means of resolving the issue. Or, as business journalist Phillip Liu has claimed (1993:33), perhaps it was US pressure to legalise cable as a means of dealing with the controversial copyright issue that was finally decisive. Market considerations, that is, rather than political ideology, seem to have been the driving force in restructuring the Taiwanese cable TV industry.

Prior to the 1993 Cable Law, the three main groups in the industry were the original CATV operators, the Fourth Channel group, and the DPP affiliates, such as the Taichung DPP channel. However even before the passage of the 1993 Law, market changes were attracting larger investors to the industry. Several conglomerates with greater capitalisation since have entered the market, such as the United Communications group (linked with the China Trust group, and insurance company) and the KMT-related Po-Hsin group. The five main current groups now are United Communications, Po Hsin, many of the original Fourth Channel operators who now have linked themselves with the New Party (a breakaway group from the KMT in 1993), the CATV operators, and the DPP affiliated stations.

The effect of cable-TV’s expansion in Taiwan is likely in the long term to substantially reduce the dominance of the state-controlled broadcasters, as has taken place in the US. Current figures show there have been sharp declines in the broadcasters’ prime-time news ratings, with the most watched channel TTV’s share falling from 41.1% in 1992 to 33.5% in 1993. Similar declines have been registered by CTS and CTV (Asian Ad. & Marketing, 20 May 1994, 18). Representatives of the state broadcasters claim that the ratings of individual cable channels still are extremely low and that the cable industry is highly disorganised. However the twin impact of cable and the expansion of new competitive satellite services, such as the recent movement of Hong Kong’s TVBS-2 to Taipei, seem certain to further reduce the total share of the traditional broadcasters.

These changes in Taiwanese broadcasting also need to be seen in relation to other new media developments. Some thirteen new FM radio stations are scheduled to begin from mid-1994 and are likely to be taken up by business, rather than political interests. A fourth national TV channel is also likely to be established in southern Taiwan at Kaohsiung, which may help to reduce the Taipei-centred bias in national broadcasting. Broadcast stations also now for the first time are being required to pay an airwaves tax on their profits, which may introduce a greater element of public accountability. As the Taiwanese media system becomes more liberalised politically, however, it is likely to experience more problems with media monopoly control issues, as evidenced by the movements of larger conglomerates into the Taiwan cable industry.
Although television began in Thailand in 1955 its reach outside of Bangkok was relatively limited until the late-1970s. National broadcasting via satellite relays did not begin until 1980 (Sethaporn, 1985: 43). By that time, the four broadcast channels - 5 (established in 1958), 7 (1967), 3 (1970) and 9 (1977) - were all managed by private companies, except for Channel 5 which remained with the Army. Otherwise, the channels were leased by private family companies from the Army, or the Mass Communication Organization of Thailand (MCOT), or the Public Relations Department (PRD).

As well as facing geographical coverage problems and a weaker economic base, the early Thai television systems - in contrast to Taiwan's - ran as a loosely decentralised bureaucracy, where state agencies and state enterprises frequently did not cooperate with each other (UNESCO, 1983: 396). One consequence of these constraints was that radio was more important as a national communications medium. By late 1975 radio's relative share of national advertising expenditure was 30%, compared to 25% for television (Boonyakatemala, 1977: 16).

The most commercially successful network and the first to broadcast in color was Channel 7, owned by the Army but leased to the Bangkok Broadcasting and Television Coy., first from 1967 to 1982, then from 1983 to 1995 (Kiatpinuchi, 1990: 17). These long term licences were one reason for the profitability of Thai television ownership. The 7 group was also the first to begin national satellite broadcasting. This achieved something the government had been hoping for since the late 1960s. In 1967 the Japanese government had funded a feasibility study for a Thai national broadcasting system (Boonyakatemala, 1977: 13). By 1981, the television share of national advertising had risen to 51%.

The complex arrangement of state agencies and broadcasting regulation in Thailand, deriving from the Radio and Television Broadcasting Acts of 1955 and 1959 and the Broadcasting Regulations of 1974, together stressed the need for national development, both of an economic and a cultural kind. The Royal family, the Nation, and the Buddhist religion were made legally immune from criticism in Thai broadcasting, while an ideology of 'Being Thai' was promoted. This seems to have been as important an aim of the national broadcasting system in Thailand as the promotion of Pancasila was in Indonesia, or Rukanegra in Malaysia (ASEAN, 1983: 150; Hamilton, 1993: 356).

Thai television, however, had a much stronger role in promoting a consumerist way of life than in either Malaysia or Indonesia because of the relatively loose and decentralised way the system juggled the interests of the state agencies, private family companies, and advertisers. A 1983 ASEAN
report on the social impact of communication policies in the region saw Thai television as being one of the major marketing tools for consumer products and services (1983: 341). In a country where dozens of communication theses would be written on the subject of how development journalism could best be used to help the rural poor (Soekchareon, 1992), the irony was that the national expansion of television in the 1980s in fact ushered in an era of mass consumerism.

The Thai system remains a compromise between the interests of commercial advertisers and the state agencies. Channel 11, established in 1987, is run by the PRD and is the only non-commercial channel with a primarily educational function, but it has limited national reach and relatively low ratings. Thailand's economic boom of 1987-1992, however, transformed the local media business. The biggest technological change in Thai television followed the launch of the THAICOM-1 satellite in December 1993. This has accelerated the growth of the cable-TV industry, which began in 1989, as well as boosting the share prices of print media.

Thai Pay-TV is currently delivered both by the Shinawattra group's IBC (International Broadcasting Corporation) and the Watachak group's ThaiSky. Shinawattra are also the licenced satellite operators with a 55% controlling share in their SCC group, and their company IBC is the market leader in Pay-TV with some 100 000 current subscribers, as against ThaiSky's 30 000 (BP, 19 May 1994, A18). Both services offer five channels each. IBC carries CNN news, HBO, Sports, and a Thai and English language (mostly American) variety; ThaiSky has Star-Plus, MTV, Prime Sports (US), BBC World Service, ATVI, and Star's Chinese (Hong Kong) channel.

Though the format of Thai broadcast television - news, entertainment and sport - is not radically different from that of Western commercial broadcasting, it strongly emphasises the use of the national Thai language in all its transmission (Diller, 1993). Chinese and American movies shown on the commercial channels are all dubbed into Thai, while the cable channel programs on HBO and the IBC English-language entertainment channel are subtitled in Thai. 1994 is the 'Year of Being Thai', a theme which often surfaces on television. Thai TV regularly broadcasts national cultural events, which centre round the Thai Royal Family or Buddhist celebrations. These specials are shown on all five government channels simultaneously several times a month. After evening news broadcasts the channels also transmit short documentaries mostly made by state agencies, such as the Tourism Authority of Thailand, or the electricity authority EGAT, often concerning rural development issues.

The launch of THAICOM-1 in December 1993 seems certain to have important long-term effects in restructuring the Thai media in future. Two elements of change here are the size and influence of the Shinawattra group,
while the other is the surge of cross-media interest in bidding for a new commercial TV channel, Channel 12. In political terms, the Channel 12 issue has considerable symbolic importance, as it was raised as one of the reforms necessary after the May 1992 killings of pro-democracy demonstrators, as local television had ignored and even misreported the event. Both of these factors appear to be shifting the Thai communications system further away from the tradition of state control.

The Shinawatra group began as a distributor for IBM in North Thailand in 1983. Under its Sino-Thai family manager, Chairman Thaksin Shinawatra Ph.D., Shinawatra diversified into telecommunications and broadcasting in 1988. In 1989 it won rights to become a major cable broadcaster through its IBC group. Subsequently in 1991 it won a thirty year licence to operate THAICOM satellites from the MCOT. THAICOM-2 is expected to be launched in mid-1994. As well as operating the satellite through its Shinawatra Satellite Coy. (SSC), and cable-TV through IBC, the group has three other major companies. Shinawatra Computers and Communications (SCC) is involved in computer and telecommunications sales; Advanced Informatics Systems (AIS) operates a paging system and other value added telecommunications services; and Shinawatra International (SI) has large broadcasting and telecommunications projects in Cambodia, Laos, and the Philippines (Shinawatra, 1993).

Some of Shinawatra's main competitors, such as Siam Broadcasting (SBC), United Communications, and Samart Plc, have complained of preferential treatment of Shinawatra by the government (BP, 16 April 1994). Nevertheless, in May 1994 both IBC and ThaiSky were given approval to extend their cable-TV services to provincial areas, where there are already established, but illegal, cable operators in the major centres. IBC plans to be in sixteen provinces by end 1994, while SBC's ThaiSky aims at serving twenty provinces. SBC also plans to provide some locally produced native language programs, such as in Yavi in the South, as well as in Chinese (BP, 19 May 1994, 18; N, 20 May 1994, B1). To do this, they recently have contracted with Sakha Mongkhol Films, the biggest Chinese film agent in Thailand. SBC's new Vice-chair, Kitipat Rungthanakiat, also has links through his own radio interests with other provincial radio businesses (N, 1 June 1994, B2).

Shinawatra is also bidding for Thailand's new commercial TV Channel 12, as is almost every other Bangkok media interest. Planned originally as a UHF station (unlike the existing broadcast services) for parliamentary broadcasting, now the intention is to use it as another commercial channel. Five groups are competing for the licence. Three of the five bidders include major newspaper companies. The Bangkok Broadcasting group includes the CP company and Thai Rath; the Siam TV and Communications group includes the Siam Commercial Bank, United Cinemas (the largest group of
film exhibitors in Thailand), and the Daily News; while the Samart group includes The Nation publishers, and Pacific Inter-Communication.

Most of these groups also have pledges of technical and programming support from major foreign media groups. Bangkok Broadcasting claims support from the NHK, Samart from CNN and Channel 9 (Australia), and Siam TV has the BBC’s support. Arguing for the Samart group’s bid, one of its members, Suthichai Yoon, the high-profile editor-in-chief of The Nation publishing group, called for a public hearing on the project. He claimed that the events of the May 1992 bloody crackdown on pro-democracy demonstrators had been exacerbated by the failure of the existing TV stations to report the events (N, 11 May 1994, B2).

Current controversy about the new Channel 12 licence centres around Shinawatra’s aggressive bid. The group has claimed the right to be the operator due to its being the originator of the technology needed to run as VHF channel next to UHF Channel 11 without disrupting Channel 11’s own signal. Shinawatra has claimed the project technique as its own intellectual property right (N, 2 June 1994, B1). Conversely, some government advisers, such as Chulalongkorn University’s Darunee Hirunrak, argue that program quality should be the main selection criteria, not just technology (N, 2 June 1994, 1). The Director of the MCOT, however, says that local Thai television is hampered by domestic regulation, which disadvantages it against foreign satellite broadcasters. He suggests that Thailand should launch its own international television English language service based on the Thai National News Agency (BP, 2 June 1994, 17).

Australia: Pay TV Muddle and the Renewal of Public Broadcasting

Australia based its television system on the existing dual radio structure of commercial and public broadcasting. The two first commercial channels, 9 and 7, and the Australian Broadcasting Commission (ABC), began in 1955. Subsequently a third commercial channel, 10, was launched in 1967, despite sensible warnings that the national market was not large enough to support three commercial channels. In fact, the original 9 network (owned by Packer’s Consolidated Press) became and remains the flagship of Australian commercial television, while the 10 network is still financially the weakest. The most recent television service to be established was SBS-TV (SBS-Radio began in 1975), the nation’s unique publicly funded multicultural broadcaster, in 1980.

Despite the importance of the public television sector in Australian broadcasting, it is more accurate to see the Australian television system as being much closer to the North American free enterprise model, with its relative preference for commercial self-regulation, than to British or European broadcasting (Collins, 1994). The ratings of SBS are still relatively
low and it can only be received in some nine of Australia's largest cities, though this includes all the state capitals, while the ABC is seen by many as mainly providing a valuable news service. Commercial television is where the money, advertisers and the audiences are. Also, since 1993 block advertising has been permitted on SBS-TV, while sponsorship is now permitted on Australia Television (ATV), the nation's new international service which started on February 1993.

Certain principles have recurrently stood out in policy debates. These are the need to provide universal service, to provide local content in broadcasting, to prevent undue media monopoly ownership, and to promote Australian content. More debatably, there also has been a tendency to see broadcasting as a means of improving public standards (Armstrong, 1991). Many of these traditional concerns in Australian policy debates, however, came under siege in the deregulatory 1980s, where such pressures had considerably greater impact on the economy and public policy than in many Asian countries (Pusey, 1991).

Two key policy decisions set the stage for major changes in broadcasting in the 1980s. One was the Fraser Liberal government's 1979 decision to launch AUSSAT, the first national communication satellite. The argument advanced most strongly for this was that television services could then reach Australia's isolated outback areas. Existing provincial television companies, however, vigorously opposed this measure, as they rightly anticipated the introduction of competitive, probably metropolitan-based, services, would cut deeply into their own substantial profits.

The second important policy decision was the 1981 Broadcasting Act's Amendments. These basically limited the role of the fledgling ABT by preventing it from requiring prior approval of media takeovers and acquisitions of media proprietors. This allowed the Murdoch group to consolidate its television interests in Sydney and Melbourne in the 10 network. Because the Australian commercial television system was privately owned outright, unlike the state-owned but privately leased systems in Taiwan and Thailand, Australian media companies operated more like their American counterparts. They had a wide range of cross-media ownership holdings in the press and magazine industry, and, to a lesser extent, in radio. Packer's original strength, for instance, was the magazine industry.

Three factors subsequently transformed the national media marketplace after 1985. First, there was the launch of AUSSAT; second, 1986 policy changes altered existing cross-ownership regulations radically and permitted the aggregation of regional television; third, the economic boom of the mid-1980s followed by the sharp recession between 1987 and 1993. It was in this turbulent context in which the growing internationalisation of Australian television was taking place.
The launch of AUSSAT made it possible for metropolitan broadcasters to relay to country areas, while the new ownership rules changed the condition that no proprietor could own more than two television stations, replacing it with the provision that no proprietor could have more than 60% of the national audience. This was a great commercial incentive to the industry, but the accompanying condition was that media cross-ownership was no longer allowed. This made Murdoch decide to leave television in Australia to consolidate his print holdings. He chose to concentrate on his British press and satellite interests, as well as Fox Broadcasting in the US, and in 1987 acquired the Herald and Weekly Times group of Melbourne, traditionally one of the largest national press companies which his father originally had built up (Osborne and Lewis, 1995).

There were two main outcomes of the mid-1980s changes. First, there was a complete upheaval in the ownership of the metropolitan television networks. Fuelled by the speculative share boom of the time, a new generation of media entrepreneurs emerged. Alan Bond bought 9 from Packer; Christopher Skase acquired 7 from Fairfax; and Frank Lowy purchased 10 from Murdoch. These groups now were also poised to establish national television networking in Australia, something which before had not been possible (Chadwick, 1989).

Second, the extension of metropolitan programs by satellite into Australia’s main provincial centres now could take place through the government’s aggregation policy. Four eastern markets were created for the introduction of the scheme, with the south-east region of NSW, centred around the national capital of Canberra, selected as the first aggregated market. In effect, this meant that whereas previously Canberra had only one commercial channel, Capital Television, and the ABC and SBS, after aggregation two more commercial channels were brought in, Prime and Win. The original commercial station, Capital, since has lost ground mainly to the Win station, which is an affiliate of the 9 network, and relays much of its programming from Sydney via Wollongong-Canberra. The outcome has been more choice for Canberra viewers, but a noticeable loss of local identity and content (Wallace, 1993).

The most recent changes in the commercial market have been the imminent introduction of Pay-TV, the growing internationalisation of programming through direct satellite broadcasts, and the re-entry of Packer, and to a lesser extent Murdoch, into television proprietorship. The excessive prices paid by the new media owners proved costly as they were followed by the 1987 stock market crash and a subsequent recession. By 1990 the 7 and 10 networks were in receivership. Packer’s News Corp. repurchased the 9 network in 1990 and also took over the club and hotel satellite service SkyChannel from Bond. Murdoch and Packer also too up a 15% share each in
the 7 network in 1993 (Television Business International, Sep. 1993, 12; Mayrhofer, 1994), while 10 now is owned by a Canadian company CanWest, which has a 15% shareholding but a 57% economic interest. Murdoch’s most recent move, however, has been into Asian television through his purchase of a major share in Star-TV of Hong Kong in 1993.

The biggest policy muddle in many years, however, has been the tortured dealings over Pay-TV services. With the surprise re-election of the Federal Labor government in 1993, its plans for the introduction of Pay-TV seemed quite unprepared. Pay-TV had been widely seen as a means for the government to recoup some of AUSSAT’s huge operating losses. AUSSAT had been sold to Optus, an Australian-based, but foreign and Australian owned group, in 1992, which would use it to compete with Telecom, the national phone company, in the international and long distance market, and to run Pay-TV and other television and information services. A series of administrative blunders allowed several rounds of speculative bidding to take place, until in late 1993 it seemed that the UCOM group had the A-licence and the Australis group had the B-licence. Each licence will allow two pay channels and the ABC is guaranteed another two channels. This story is not yet concluded. A consortium of Packer, Murdoch and Telecom (PMT) are still gambling that pay services can be better delivered by fibre optics than by satellite.

Meantime, the public broadcasting sector in Australia has managed to survive the worst of the free market trends of the 1980s and the long years of staff shedding and budget cuts. Though their future is by no means rosy, both SBS and ABC have made significant progress in service delivery. This is most notable in international terms with the ATV service, though in fact the achievement of SBS TV is quite substantial, especially as SBS is a ‘no frills’ operation with some 200 full time staff as against the ABC’s 3000.

Yet it is the ABC’s ATV international service that is one of the more notable Australian recent broadcasting achievements. It now covers Indonesia, Malaysia, Singapore, Thailand, and the Phillipines. A rebroadcast agreement also has been signed with Guangzhou television in South China. A recent foreign affairs news release claims that ATV has a potential audience of more than 24 million people in the region. There are also plans to retransmit ATV from Apstar-1 instead of from Palapa-B2, which would allow coverage of all China, Korea and Japan. There is a further plan to move to Apstar-2 in 1995 to extend coverage to the Middle East and parts of Europe and Africa (Insight, 28 Feb. 1994, 18).

The commercial future of ATV is by no means assured and already it has its share of local critics (e.g., Hodge, 1993; Cunningham and Richie, 1994). Nevertheless, Australian public broadcasting seems to have survived the worst of the privatisation movements of the 1980s. This is in sharp contrast
with the privatisation of public broadcasting in New Zealand in the same period. Admittedly, New Zealand began its Pay-TV services in 1990 and Australia is still waiting, but the privatisation of broadcasting in New Zealand has been by no means an unqualified success (Winter, 1993). In any case, it is arguable that Australia's conservatism in this regard has been worthwhile, as it has retained a vital public broadcasting sector.

Towards a Comparative Conclusion

This all too brief survey is admittedly impressionistic. Nevertheless, how can we best compare these three countries' diverse experiences? As originally claimed, three frames of reference are useful in making the comparison. First, the scale of services. Second, the way broadcasting policies have satisfied different national sets of priorities. And third, how the public sphere has been constructed by each broadcasting system.

The most straightforward of these questions is that of scale of coverage. Because of its relatively small size, Taiwan has the least problems in this regard, Australia has the most, and Thailand's experience is closer to Australia's. The distinguishing feature of Taiwan television currently is rather the plethora of channels that are available by cable and satellite. Taiwanese systems can now deliver programs from Japan, Hong Kong, the PRC, Indonesia and the US, and there are as many as fifty channels available in a range of languages from Mandarin and Cantonese, to Bahasa Indonesian, Japanese and English. So although the Taiwan television industry's production and delivery capacity is behind that of Hong Kong's, it is now in the forefront of program reception in Asia.

Secondly, how have the communication policies of these three systems handled the issue of competing national values? First, the commercial system in Australia and the state-owned channels in both Taiwan and Thailand - with the exceptions of one public channel each on both countries - are advertiser driven. The Australian commercial channels have not been constrained by the political and cultural supervision that has shaped broadcasting in the other two countries, but all three systems have a commercial bottom line. In this regard the Thai and Taiwanese systems resemble each other more closely, as each had to incorporate elements of national political and cultural policies in their programming. In Australia, the nationalist agenda has been pursued instead in the dual broadcasting system. Despite the justifiable reputation that ABC programs have for editorial independence, both the ABC and SBS television have a nation building and community development role the commercial channels do not.

Another difference between Thai and Taiwanese television in this regard is identifiable. Thai television has had and retains a stronger developmental and community building role than Taiwan and stronger
emphasis on the use of the national language in broadcasting. After a brief early period when some Taiwanese language programs were produced, Taiwan broadcasting until recently also has concentrated on one language, Mandarin. However Taiwan has greater ethnic homogeneity than Thailand, and has a history of relatively continuously centralised political control; in contrast, Thailand's post-war political scene has oscillated between bouts of democracy, coups and military rule. Taiwan now seems prepared to open up to a range of different language broadcasts, whereas there is still ongoing concern about the 'pollution of the national language and culture' (BP, 7 June 1994) through foreign broadcasting in Thailand.

Third, there is the question of how the public sphere is constructed by each of the three systems. The Australian public sphere is relatively the most open and diverse of the three, notwithstanding the serious problem of media monopolies and foreign ownership. Here, again, Thai and Taiwanese experience is more similar in that both polities are undergoing democratisation. This appears to be happening more rapidly in Taiwan, possibly because of the higher levels of education and literacy of its population and its greater degree of internationalisation. Some 80% of the Thai population still live in rural areas, while the national media industry is concentrated in Bangkok. On the other hand, Taiwan did not exist as a nation state until 1947, whereas Thailand, or Siam before 1939, has a long history. Though the rapid commercialisation of broadcasting in both countries seems to be leading to a more open public culture, both systems will have to deal with the new broadcasting monopolies emerging and juggle the position of those groups against moves to privatize the still dominant state-owned broadcasting systems.

This paper has intentionally left to one side one of the central issues that would need to be discussed in a rigorously comparative approach, that is the issue of quality and foreign content in programming. More ink has been spilt about this, certainly in the Australian context (e.g., Cunningham, 1992), than most other areas of media studies. This factor certainly needs inclusion in any serious comparative analysis, however it might be useful to reconsider it not so much as the most important issue in comparing media systems, but instead as the most complex. It might be more profitably re-examined after media scholars work through some of the other dimensions relevant to comparative media analysis, such as those suggested in this paper.
References


Taiwan


Wang, G. (1994) Interview with the author, National Chengchi University, Taipei, April.


Thailand


Australia