

## Media Studies: 10

### Television: 1

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## Outline

- Introduction
- Industry structures
  - Technical & Commercial
  - Regulation
- Advertising
- 'Public Service'

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## Broadcast television industry

- Paul Nipkow (Berlin), Boris Rosing (St Petersburg), Vladimir Zworykin (StP. then RCA), Philo Farnsworth (US), Takayanagi Ken'ichiro (Japan)
- **John Logie Baird** (UK) - demo'd 1925
- 2 Nov 1936: BBC opens first regular service of "high-definition" television from Alexandra Palace in North London

Also see - <https://artsandculture.google.com/exhibit/opening-night-of-television-alexandra-palace/OgLiGoPscXVw?hl=en>

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## National systems

- Systems vary from country to country
  - Local regulations and laws
- Economics tends to be similar in many ways
  - US model - primarily commercial
  - European model - 'mixed'

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## Economic scale of global broadcasting

- Estimates of total economic value of tv and broadcasting ....
  - 2017: \$64 billion → 2022: apx.\$120 billion (est.)
  - **US and European companies roughly share 60% of incomes**
- Online video ad spend
  - 2017: \$16 billion → 2022: \$37 billion

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## OTT services

- 2022: Global video streaming market size valued at **\$455.45 billion**
- 2023: projected to grow to **\$554.33 billion**



<https://www.fortunebusinessinsights.com/video-streaming-market-103057>

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<https://www.cnbc.com/2018/01/30/digital-tv-and-video-industry-to-exceed-100-billion-study-says.html>

## Types of broadcasters

- PSB & Commercial
- National, Local, Community (Transmitter power)
- Delivery method
  - Terrestrial
  - Satellite
  - Cable
  - Net

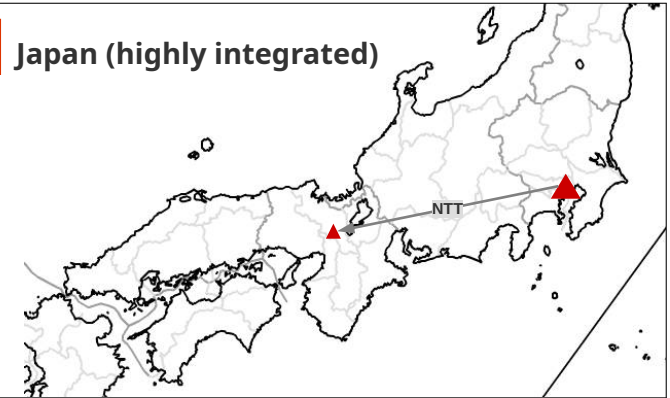
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## Types of companies

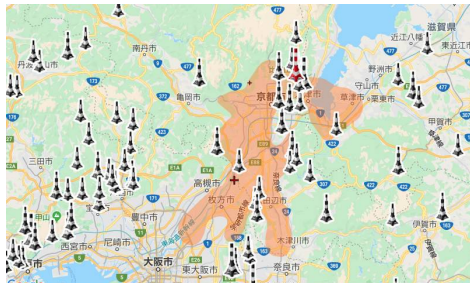
- **Broadcasters** (Scheduling, 'channels')
- **Program makers**  
'Channels' show programs made by a variety of producers
- **Technological infrastructure**  
Signal distribution maybe carried out by separate companies (terrestrial, cable, satellite, web)

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## Japan (highly integrated)



## Multi-layered system



<http://apab-tv-area.jp/map/26>

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## Media 'systems'

When reading academic work on media systems you will come across **three** main categories:

- 'Mixed'
- Commercial
- State-run

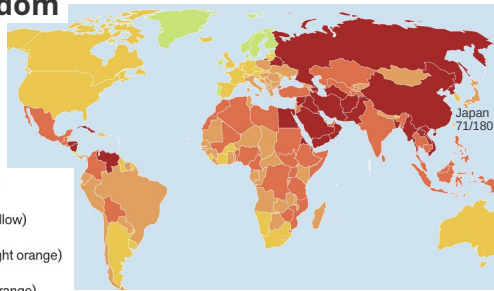
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## State-run: Singapore

- Temasek Holdings (sovereign wealth fund)
  - Sing. President also has the right to appoint, terminate, or renew the members of Temasek's board of directors
- **Mediacorp**
  - 11 radio channels
  - 6 TV channels (Malay, 2 English, 2 Chinese, Tamil)

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## Press Freedom



- [85 - 100 points]** good (green)
- [70 - 85 points]** satisfactory (yellow)
- [55 - 70 points]** problematic (light orange)
- [40 - 55 points]** difficult (dark orange)
- [0 - 40 points]** very serious (dark red)

<https://rsf.org/en/index>

## Press Freedom

|    |               |       |     |              |       |
|----|---------------|-------|-----|--------------|-------|
| 1  | Norway        | 92.65 | 171 | Syria        | 28.94 |
| 2  | Denmark       | 90.27 | 172 | Iraq         | 28.59 |
| 3  | Sweden        | 88.84 | 173 | Cuba         | 27.32 |
| 4  | Estonia       | 88.83 | 174 | Vietnam      | 26.11 |
| 5  | Finland       | 88.42 | 175 | China        | 25.17 |
| 6  | Ireland       | 88.30 | 176 | Myanmar      | 25.03 |
| 7  | Portugal      | 87.07 | 177 | Turkmenistan | 25.01 |
| 8  | Costa Rica    | 85.92 | 178 | Iran         | 23.22 |
| 9  | Lithuania     | 84.14 | 179 | Eritrea      | 19.62 |
| 10 | Liechtenstein | 84.03 | 180 | North Korea  | 13.92 |

Ten free-est

Ten least free

## Reporters without Borders

- “[Singapore] does not fall far short of China when it comes to suppressing media freedom.... [G]overnment is always quick to sue critical journalists, apply pressure to make them unemployable, or even force them to leave the country. The **Media Development Authority has the power to censor all forms of journalistic content.** Defamation suits are common and may sometimes be accompanied by a charge of sedition, which is punishable by up to 21 years in prison.”

<https://rsf.org/en/singapore>

## Personnel Management

Kim Dae-jung, the first opposition party leader to take power, at a rally in Seoul in 1989. Credit Yonhap News Agency



Kim, H. S. (2003). Media, the public, and freedom of the press. *Social Indicators Research*, 62-63(1):345-363.

“[I]n late 1998, then newly-elected Korean President Kim Dae Jung **chose the presidents of the two television networks from among his close associates.** These new network chiefs then inevitably replaced their respective news directors with their personal favorites. In 2000, the president of the *Yonhap News Agency* was also replaced with an associate of President Kim.”

## Public Service Broadcasting

“It is clear that in a global broadcasting landscape caught between the state-controlled model, where ruling political elites dominate broadcasting to strengthen their grasp on political power, and the commercial systems, which pay heed only to the logic of profit and advertising revenues, **the only way to protect and to promote the public interest is through the enhancement of public service broadcasting (PSB).** Recent developments in broadcast-ing around the world lead us to the compelling realization that PSB is more relevant than ever before, and that it is urgent to nurture and strengthen PSB institutions and practices to safeguard the integrity and interests of “citizens”.

*Public service broadcasting: a best practices sourcebook*, Banerjee, I. (AMIC) 2005 21 / 36

## Public Service Broadcasting

### 5. The BBC’s Mission

The Mission of the BBC is to **act in the public interest, serving all audiences** through the provision of impartial, high-quality and distinctive output and services which **inform, educate and entertain.**

[http://downloads.bbc.co.uk/bbc/trust/assets/files/pdf/about/how\\_we\\_govern/2016/charter.pdf](http://downloads.bbc.co.uk/bbc/trust/assets/files/pdf/about/how_we_govern/2016/charter.pdf)

## Licence fee costs (EU)

"All in all, the financing of public service media is currently undergoing important changes, moving PSB away from the conventional middle towards a more market oriented situation. Critics are demanding return to purity of form and content in the PSB-sector. They claim that PSB has overreached its position and is causing harm for market-oriented interests. Although quite a few politicians agree with the critics, most decision makers of the Nordic countries, however, still support the licence fee system, as well as the principle of **PSB at arm's length from the commercial market**, and turn down direct tax-based state intervention."

|             | Licence fee |
|-------------|-------------|
| Austria     | 255.4       |
| Switzerland | 177.2       |
| Germany     | 204.4       |
| Denmark     | 288.4       |
| Finland     | 208.2       |
| France      | 116.0       |
| GB          | 201.2       |
| Ireland     | 158.0       |
| Italy       | 104.0       |
| Norway      | 257.7       |
| Sweden      | 220.2       |

2007 data from - Berg, C. E. and Lund, A. B. (2015) Financing Public Service Broadcasting: A Comparative Perspective. *Journal of Media Business Studies*, 9(1):7-21

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## Mixed Systems

|            | Japan                         | UK                                   |
|------------|-------------------------------|--------------------------------------|
| PSB        | NHK                           | BBC                                  |
| Commercial | NTV, Asahi, Fuji, TVTokyo etc | ITV, Channel 4, Five etc             |
| Various    | BS and CS Satellite           | Various satellite and cable services |
|            | Variety of cable channels     |                                      |

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## Distribution and Delivery

- Separation of content and delivery
- Program creation (artistic?) vs technical aspects



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## Regulation

- **Who** is allowed to participate in the particular market (produce, broadcast, transmit)?
  - "Fit person" (character, personality etc)
  - Nationality
  - Licensing process (Bidding? Public good?)

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## Foreign Ownership

### Russia tightens limit on foreign ownership of media

The legislation...forbids international organisations and foreign citizens, companies and governments from founding or holding more than a **20%** stake in Russian media businesses.



<http://www.theguardian.com/world/2014/sep/26/russia-limit-foreign-ownership-media>

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## Japan: Broadcast Law

### Article 52-13

Any person who intends to be engaged in the program-supplying broadcast business [...] shall have **approval of the Minister for Internal Affairs and Communications** for such person's conformance with any of the following items:

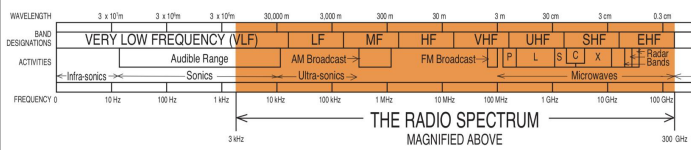
v) A person who intends to conduct the business activities concerned shall not come under any one of the following items: [...]

- A **person who does not have Japanese nationality**;
- A foreign government or its representative;
- A foreign juridical person or organization;

**Proportion of shares owned by foreigners has to be declared** and must be under a certain proportion depending on the type of organisation.

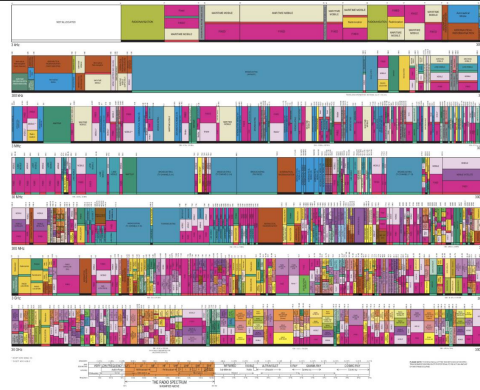
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## 'Spectrum scarcity'

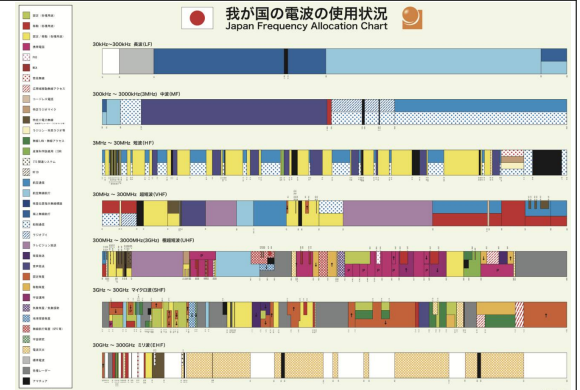


Infrared - Visible - Ultraviolet - X-Rays - Gamma Rays - Cosmic Rays  
0.03cm 3x10<sup>-7</sup> Å

## UNITED STATES FREQUENCY ALLOCATIONS THE RADIO SPECTRUM



## 我が国の電波の使用状況 Japan Frequency Allocation Chart



## Changes in spectrum use

- Auctions
- Mobile phone networks



## Spectrum is valuable!

### Agency Publishes Estimate of Bids for 2016 Spectrum Auction

Elizabeth Wasserman and Todd Shields February 7, 2015 — 2:04 AM JST

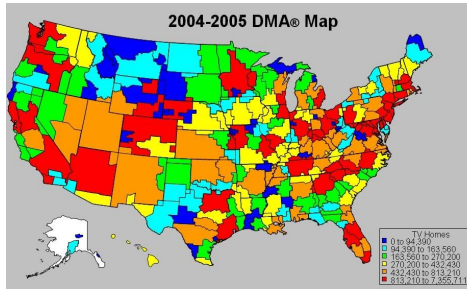
The FCC raised a record **\$41.3 billion** in its last auction, which closed Jan. 29. Leading bidders included Dish Network Corp., AT&T Inc., and Verizon Communications Inc.

An auction in 2008 drew \$19.6 billion in bids.



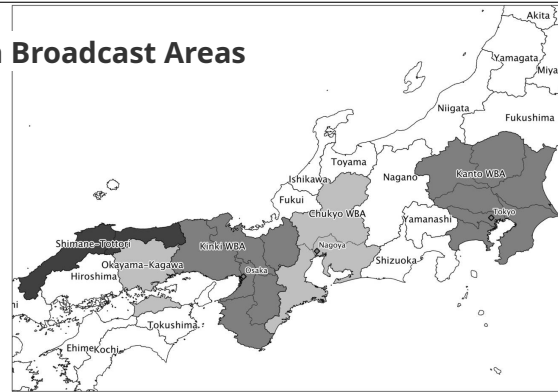
## Broadcast areas

- US: Designated Markets Areas (201 DMAs – Nielsen)
- Apx 1400 stations

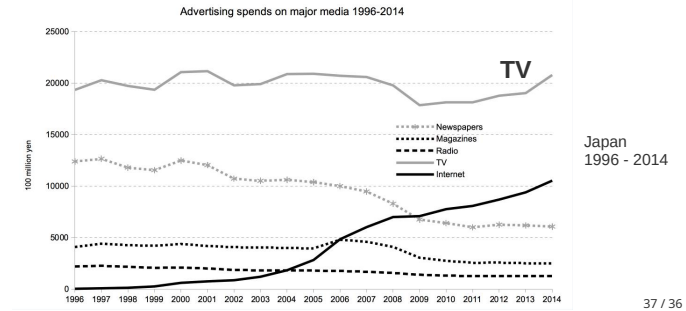


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## Japan Broadcast Areas



## Financing broadcasting



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## Sponsorship/Products Placement

- “During the 2004-5 season, the major networks included more than 100,000 placements valued at **\$1.88 billion**, up 28 per cent over the preceding season. Advertisers may pay a fee for the placement or provide an in-kind service [...] In many cases the placement is bundled with the purchase of ad spots for the same programme.”

Curtin, M. and Shattuc, J. (2017) *The American television industry*. Bloomsbury Publishing

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## Summary: A Television Industry ?

- Almost misleading to talk of A TV industry
  - TV is the result of the interaction of several quite different types of bodies
- The content we ultimately encounter will generally be influenced by the various behind-the-scenes operation of these industries and related bodies.

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Ends

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