Chapter 2
International Communications in Western Broadcast Media

2.1 Past and Present: US, UK, and Japan

Since the 1990s there has been a growing body of research on international communications. The experiences of developed countries in international communications offer particularly useful insights into developing China's communicative power in terms of broadcast media.

Spurred by the end of Cold War, international politics underwent fundamental changes in the early 1990s wherein the US came to occupy the dominant global role and other developed countries competed among themselves. For the American historian Francis Fukuyama (1992), the 1990s marked 'the end of history', but for Samuel Huntington (1996) this was the beginning of a 'clash of civilisations'. The 1991 Gulf War showcased US hegemony and its unilateral foreign policy, but the subsequent regional wars, territorial disputes, and ethnic and religious conflicts led to more complex international relations. This trend was particularly evident in the 9/11 terrorist attack of 2001, which marked a turning point and signalled that Western power and influence was in decline. It also offered an opportunity for the emergence and development of multilateral international relations, in which 'peace and development' were the main trends.

Meanwhile, economic globalisation facilitated international communication, or the 'globalisation of communication'. Throughout this process, developed countries found new channels for reaping benefits, while developing counterparts had the chance to import funds and technologies. However, the information divide was widening because of the unequal development of communication technologies. Developed countries used their technological advantage to circulate their ideologies around the world. Moreover, collaborations between different countries and regions, and increased opportunities for international communication meant that the significance of discursive power was enhanced (Liu and He 2011, p. 54).

It is important to note the impact of new communication technologies. They not only brought human beings into the era of digital communication but also deepened

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the development of international communications. Technologies such as communications satellites and the Internet changed the landscape of international relations. For China, this technological revolution represents an opportunity and a challenge. To better devise China's communications strategies within new media environments, we need first to learn lessons from developed countries in terms of international communications.

2.1.1 International Communications of American Broadcast Media

2.1.1.1 Technological Development

1. Satellite TV and Radio

Satellite TV makes use of communications satellites—directly above the Earth's equator—which are used to receive signals from broadcast stations and then to transmit them to specific territories. Audiences can receive these signals through a television set or radio and thus watch or listen to their desired programmes.

One of the trends discernible in the application of satellite technologies to broadcast media is the shift from programme transmission to live streaming. Satellites can directly broadcast programmes to individuals, families, and portable media players, which greatly reduces broadcasting costs and opens up new avenues for development. Perhaps the best example in terms of satellite digital radio services is Sirius XM. The US company—born of a merger between the Sirius Corporation and XM Satellite Radio—has streamed more than 100 programmes since November 2011.

XM Satellite Radio was the first satellite digital radio station in the US to broadcast programmes 24-h per day, seven days per week. Among its 130 channels, 71 were related to music, with specialist stations for genres such as country, blues, hip-hop, rock, classical and opera. There were another 13 channels dedicated to news, and 16 channels covering sports, talk shows, entertainment, and children's programming.[1]

XM adopted a fully digital operating system—using fibre optics and computer servers to replace traditional metallic infrastructure. At its height, XM had 82 digital studios, more than 20 multifunctional centres, and 310 audio stations. On its computer systems, XM stored 150–200 million songs, recordings of dozens of musicals, and thousands of interviews with hundreds of celebrities.

At the end of 2005, the prominent XM presenter Howard Stern transferred to the Sirius Corporation on a $100 million, five-year contract, a deal which brought millions of loyal listeners to Sirius. In March 2008, the US Department of Justice granted the merger of Sirius and XM. Sirius spent $3.3 million to buy XM, which

[1]For more detail, please see M. Liu (2006).

increased subscribers to American satellite radio from 20.5 million in 2008 to 39 million in 2012 (Zhu 2008).

The portability afforded by satellite radio meets the needs of most American users. It is characterised by easy reception and good-quality sound. In addition, the reception of satellite signals is not negatively affected by movement on the part of the receiver, meaning users can listen to any programme at any time.

When it comes to satellite television, there are two methods to transmit programmes. The first one involves satellites providing broadcast signals to territorial stations, with these converted and transmitted in analogue to TV sets. This television technology has been commonly used around the world for many years. The second method involves satellites directly sending signals to individual users, also known as Direct to Home (DTH) transmission. DTH technology produces more transmission power from smaller satellite dishes and is affordable for most families. DTH allows for various services to be provided which are beyond the control of intermediaries, including user authentication, encryption, digital television, pay-per-view (PPV), and high-definition television. What is more, DTH offers users the ability to enjoy other digital products, such as Internet downloads and interactive television. An example is the DirectTV corporation, the first DTH service provider in the US. Launched in April 1994, DirectTV now has around 150 entertainment channels and provides 24-h broadcast services to the US and Canada.

2. Digital TV and Radio

Radio has an enhanced significance in today's environment because digitalisation allows it to be transformed into a 'new' medium. The advent of digitalisation on both radio and TV has brought about important changes in the content of programmes, customer service, and sound and image quality.

HD Radio is a digital audio broadcasting technology which is widely used in the United States, while European countries have adopted the Eureka-147 Digital Audio Broadcasting (DAB) system. The principle of HD Radio is to use digital signals to transmit audio and data for AM and FM stations, and the satellite of digital sound broadcasting (DSB) in the VHF/UHF. This is different from Eureka-147 which is applied to the spectrum not covered by AM and FM. It is also important to note that digital FM has CD-quality sound in the HD Radio environment, while AM sounds like FM.

In 2004, Howard University's own commercial radio station WHUR-FM 96.3 converted to digital broadcasting. The station placed advertisements in the programmes every several hours to remind audiences that they were listening to digital radio. In addition to high-definition audio quality, digital radio can use the traditional AM/FM spectrums to provide a variety of programmes. Through the adoption of supplementary audio services, radio corporations can produce two or more channels within one radio spectrum. Meanwhile, digital technology can help traditional radio corporations squeeze two or three channels into one wave, so as to meet the competition challenge from satellite and Internet radio stations.

Digitalisation has eliminated the frequency scarcity associated with traditional radio broadcasting. Through Digital Audio Broadcasting (DAB), it has been

possible to provide digital products such as images, text, data, and moving pictures. Digital Multimedia Broadcasting (DMB), as it is known, is further characterised by the high-speed reception of multimedia messages, encryption, low transmission power, efficient uses of the spectrum, and the elimination of interference. This has opened up new avenues for the development of traditional radio.

The American television industry underwent the analogue-to-digital transformation in 2009. Consumers had to connect digital boxes to their old analogue TV sets, or buy new digital TV sets if they wanted to watch digital programmes. However, the economic slowdown in the US caused by the debt crisis had a severe impact on low-income groups who could not afford to purchase new TV sets. At the same time, other consumers—especially university students and white collar workers—relied on laptops or mobiles phones to watch videos online, instead of paying subscription fees. As AC Nielsen has pointed out, American consumers have adopted multiple channels to watch television.

This is not a good sign for the traditional television media, which is confronting serious challenges from the Internet. The decreased number of television households seems to support the assumption that 'the Internet will replace television'. Yet, there is no definitive conclusion, as the television still plays an important role in the current media environment.

3. Internet Radio and TV

Internet radio is a new form of transforming and optimising traditional audio services through the communicative advantages afforded by the Internet.

In April 1995, RealNetworks (then known as Progressive Networks) first launched its Real Audio System interface to provide an audio streaming service on its website, marking the birth of Internet radio. In comparison with traditional radio stations, Internet radio programmes tend to be more narrowly targeted. For instance, the China Radio International (CRI) launched an online application—'Tingting FM'—in November 2014, which specifically streamed a variety of songs, along with talk shows, interviews, music videos, sports and so on. In the following years, there was a steady increase in Internet radio listenership. This might also be related to the synchronous and/or asynchronous characteristics of online radio which enables audiences to listen to their desired programmes at any time.

Podcasting—a portmanteau word which combines 'iPod' and 'broadcast'—is a webcast automatically sent to subscribed users. Between the end of 2004 and early 2005, some non-profit radio stations in the US such as WGBH—a public radio station located in Boston—transformed previously-broadcast shows and interviews into podcasts for users to download. Similarly, VOA began producing its news programmes in the MP3 format. On 16 May 2005, Infinity Broadcasting Corporation launched the first podcast station by transforming a medium-wave station into a K-wave station, and inviting listeners to upload their DIY podcast programmes (Hui 2007).

A salient change associated with podcasting is the proliferation of high-quality, free content on web platforms. One of the best examples is RSS—an XML-based format that allows the syndication of lists of hyperlinks, along with other

information, or metadata. Being open for subscription and choice, the technology brings new life to the radio. Every person has the chance to become a presenter, and anyone can subscribe to and download their preferred podcasts. In the US, many prominent TV and radio presenters have joined the podcasting ranks. In this sense, Internet radio has brought about major changes in networked communication and attracted widespread attention.

Interactive Personality TV (*IPTV*) describes services which combine digital television, portable television and interactive television. Core to its operating principle is to connect digital boxes or computers to broadband, and transmit Internet-based content through the screens of TV sets, laptops or portable devices. The advent of IPTV has led to new modes of television viewing, whereby audiences can watch their desired programmes at any time and place. In this regard, audiences are no longer passive.

Aside from mere convenience, the deep economic recession which occurred after the debt crisis of 2008 may have been a further prompt for users to cast aside digital boxes and watch programmes over the Internet, or purchased 'on demand' services. Certainly cable television companies were negatively affected by the loss of a huge number of subscribed customers during this time.

4. Mobile Radio and TV

Mobile radio relies on telecommunications and the Internet, and allows users to listen to or choose online radio programmes on their mobile devices. *Mobile television*, similarly, allows high-quality audio and video content to be consumed through such devices. Mobile television not only provides traditional audio-visual programmes, but also interactive services. Mobile television therefore opens up new avenues for the development of value-added multimedia services.

In 2007, Qualcomm—an American telecommunications company—announced it would spend $800 million to develop MediaFLO, a mobile TV service. MediaFLO was used to transmit audio, video and data to portable devices. The wireless company Verizon then promptly released eight commercial mobile television channels based on the MediaFLO technology, with AT and T immediately following suit. In addition, several Asian telecommunications companies showed a strong interest in MediaFLO, and started to consider importing the technology. The global popularisation of mobile television beckoned.

2.1.1.2 Industrialisation of Broadcast Media

1. Systemic Transition

The US government has conducted the surveillance and management of its broadcast industries in three historical stages. The first stage was regulated production. Early US radio followed the public service principle and was unconstrained by law but this caused an explosion in the number of radio stations, and the

quality was often low. The Radio Act of 1927 ended the 'chaos', leading to a decrease in the number of radio stations from 681, in 1927, to 606, in 1929. In addition, the body regulating this act—the Federal Radio Commission—limited the number of broadcasting licenses for night-time radio stations, from 565 to 397. From a regulatory perspective, US radio was, to some extent at least, under control.

The second stage involved the reinforcement of surveillance. Although the Radio Act of 1927 had some effects, it only applied to the radio industry. As the television industry developed, it became necessary to manage both networks. Between the 1960s and the 1970s, the Federal Communication Commission (FCC) imposed a series of regulations on radio networks and cable systems, which caused a number of effects, and allowed the monopoly status of commercial radio and TV networks to be established.

The third stage represented an attempt to find balance between government regulation and market freedoms. Control of broadcast industries during the second stage had the effect of limiting the moderation function of the market. The FCC thus eased regulation from the end of the 1970s, and continuously expanded the content into the 1980s. In 1992, the FCC reinforced 'duopoly rules' which effectively prevented an owner from having more than one AM or FM stations.

2. Organisational Structure

In terms of structure of the US broadcasting industry, there are mainly three types of organisations: corporations, sole-proprietorships, and non-profit organisations (NPO). Of these, the former two dominate.

Broadcasting industries in the US rely on two modes of operation: commercial and public service.

Statistics related to the US television industries divide the industry into three categories: TV broadcasting, cable television, and premium TV. According to the latest data, the number of subscribers to cable television has dropped considerably, though overall revenue across the television industry has grown. In this sense the US television industry can be said to be showing an upward trend.

In the early 1990s, many commercial broadcasting corporations—HBO, ESPN, MTV, and Disney among them—began to make efforts to expand their overseas markets, fostering the emergence of international communication. Commercial US broadcasts should thus not only be examined within the scope of domestic communication, but constitute an important part of international communication. These programmes publicise American values, morals, and social norms, so as to fulfil their mission to contribute to the development of international communication.

On 1 October 1990, the US Information Agency (USIA) merged Voice of America (VOA), Radio and TV Marti, 'International television networks', and the Department of Television and Film into one unit. The new agency not only worked for the business interests of international broadcast media, but also served as a department. In addition, it met the needs of both domestic and international audiences, and guaranteed the 'safe landing' of international communication within the domestic.

Between 1997 and 1998, expenditure on VOA was cut by 20 per cent. To make up the deficit, VOA established development offices, expanded contacts with big corporations and created profit strategies. In this respect, the main role of international radio in Western countries is to contribute to international communication, while international television covers both domestic and overseas markets, setting market expansion as the ultimate goal.

3. Media Groups

The trend towards the globalisation of radio and television began in the 1990s. During this period there was a rising tide of media mergers, in which radio and television constituted one of the most important parts. These new conglomerations became a crucial tool within political, economic, and cultural realms around the world.

The important changes in international communications in the 1990s include the privatisation of media industries, the dominance of free market economics, and the industrialisation and commercialisation of communication information. Against this backdrop, transnational media corporations became a key actor within international communications. In essence, global media was controlled by a dozen vertically integrated companies, most of which were based in the US (Herman and McChesney 1997).

In the summer of 1995, US media groups initiated a wave of mergers and acquisitions. On 31 July 1995, the Walt Disney Company announced it would spend $19 billion to buy out ABC; the following day, Westinghouse Electric Company spent $5.4 billion in a stock market-driven acquisition of CBS; on 22 August, Time Warner spent $7.5 billion buying out Turner. By 1996, ownership of the US media industry was concentrated in the hands of several corporations; by 2000, five financial consortiums controlled the entire US media industry (Shen 2003). Currently, the main media groups in the US include News Corporation, Viacom, AOL, Time Warner, and Walt Disney. At the top of the list is Rupert Murdoch's News Corporation media empire. In the 1980s, Murdoch purchased Australia's biggest media group—the Herald and Weekly Times—and became a media proprietor. He has since played an important role in different media companies in the UK, the US, and Hong Kong. Specifically, he owns the Sun and BSkyB in the UK; the Wall Street Journal and 21st Century Fox in the US; News Limited in Australia; and has a significant ownership stake in Hong Kong's Star TV and Phoenix TV.

As can be seen, large-scale media corporations dominate the US media industry. Generally speaking, these companies vertically and horizontally integrate the processes of media production and communication, and help to form an industrial value chain. Furthermore, it is these companies that guarantee US predominance in the process of information globalisation. They make use of their technological advantages to maximise the influence of American cultural values around the world. In addition, their transnational characteristics make it easier for the US to open up global markets and to increase revenue generation. In other words, as well as

fulfilling their mission to contribute to international communications, they also reap huge economic gains.

2.1.2 *International Communications of British Broadcast Media*

Since World War II, Britain has sought to continually strengthen its international communicative capabilities. Being the most representative media organisation in the UK, the British Broadcasting Corporation (BBC) has become one of the world's top international media organisations. During the 2009–2010 period, the BBC's World Service attracted a weekly audience of 188 million, providing global audiences with news, education and entertainment programmes in English and 31 other languages via radio, TV, the Internet and mobile devices.[2] In addition, the BBC has received the support of the British Government, which injects funds to support the BBC in disseminating its ideas and propositions. Since 1994, the British Government has released a succession of white papers designed to support the BBC in participating in global market competition and reflecting the openness and cultural diversity of British society. These have established the British media's leading position in the world and strengthened the national image of the UK. The current BBC Royal Charter 2007–2016 proposed that one of the six public purposes of the BBC is to 'bring the UK to the world and bring the world to the UK',[3] further clarifying the BBC's communicative strategy and philosophy.

2.1.2.1 Technological Development

Since the 1980s, the development of cable TV and communications satellites has impacted public radio and TV, which had previously benefitted from the 'scarcity' of radio spectrum resources. As a result, the BBC's TV audience share declined sharply. To address the shrinking audience situation, the BBC proposed a six-year reform and development plan—'Creative Future'. Its basic ideas and goals were as follows: the BBC should not build itself into a traditional radio and TV organisation with some new media content, but go beyond traditional radio and TV modes to transform itself into a new communication media, mainly providing on-demand audio and visual programmes and information services.[4] Towards this end, the BBC set out to strengthen the development of new technologies. An example may be

[2]See http://www.bbc.co.uk/worldserive/specialreports/annual_review_2010.

[3]See http://www.bbccharterreview.org.uk/have_your_say/white_paper/bbc_whitepapter_march06.pdf.

[4]See http://www.bbc.co.uk/pressoffice/pressreleases/stories/2006/04_april/25/creative.shtml.

seen in terms of international radio. The BBC's international radio media mainly consist of shortwave, AM/FM, digital and satellite broadcasting, as well as online radio. Although shortwave broadcasting is still the BBC's main communicative platform, its effects have been dependent on the strength of the transmission power of broadcasting stations. With shortwave losing its predominance, its power to influence was diminished. To seize the high ground in global communications, the BBC thus started to vigorously develop digital and FM broadcastings from the 1990s onward.

In July 2007, the BBC-developed 'iPlayer' was released. Users can watch and listen to almost every TV and radio programme broadcast by the BBC during the previous week via the iPlayer's on-demand online software. Moreover, most programmes can be downloaded to personal computers to watch. To adapt to the development of the latest Internet technologies, the BBC has constantly upgraded iPlayer. In July 2008, iPlayer 2.0 placed TV and radio programmes in the same interface, thus providing greater convenience for users. While watching or listening to programmes, users can switch them in pop-up windows. The automatic memory function can save a user's previous viewing records. The latest iPlayer, version 3.0, has integrated other social network resources and transplanted them to TV sets, thus maximising the sharing between online resources and traditional media resources.

In 2010, the BBC established a new technology branch, the Information System and Technology Division, to be responsible for the research and development of digital TV signal converters, digital live broadcasting, broadband cable networks and other new technologies, providing a guarantee that the BBC would continue to promote new media strategies. At present, apart from the original terrestrial broadcast platforms, the BBC is equipped with satellite, cable, digital terrestrial broadcasting, IPTV, mobile and other digital television broadcasting platforms, comprehensively tapping the potential of new media.

2.1.2.2 The Development of International Communications Strategies

With the fall in 1997 of the British Conservative government, neo-liberalism lost its dominance in radio and TV policymaking. The incoming New Labour Party practiced Giddens' 'Third Way', attempting to find a new balance between state intervention and the free market. In terms of economic management, New Labour implemented a mixed economic model of public-private co-existence, trying to overcome the drawbacks of both state intervention and the free market. The party stressed social justice in terms of social management, and it was in this climate that the public service philosophy of radio and TV was emphasised once again. The British government began to fundamentally change its policy on the BBC. Where the Conservative Party had promoted the privatisation of the BBC, New Labour endeavoured to establish a powerful and independent BBC. Given its position at the core of the public radio and TV system in the UK, the BBC also began to involve itself in business activities, on the premise of using profits generated to enhance its

public service provision. The BBC's international communication thus obtained strong policy support.

According to Zhao (1998), public broadcasting means:

> The state appoints a public trustee to exercise the right to produce and broadcast radio and TV programmes; usually the state appoints or approves a semi-independent media institution, but does not directly run daily broadcasting activities itself.
>
> Zhao (1998)

There are four basic principles of public broadcasting in the UK: (1) there should be universal service; (2) programmes should have some form of cultural or educational import; (3) broadcasting is politically neutral; and (4) the news coverage of political and public affairs shall account for a considerable proportion of total content. As a public broadcaster, the BBC has not only been under indirect government administration, but has also been free from government interference to independently carry out communicative practices. The relative political independence has protected the BBC by allowing it to adhere to the 'public service' concept and fostering its credibility.

In March 1991, the BBC launched 'World Service Television', which broadcast in Europe and Asia. As John Tusa, General Manager of the BBC's Global Broadcasting Division, said: 'The BBC's international TV shows will integrate its skill in operating broadcasting business and focus on covering the news around the world'. Similarly, James Arnold, the BBC's Chairman, commented: 'Since the BBC's broadcasting has a global reputation, the BBC's international television will also become an important force in world television'.

In spite of this, the BBC has been losing fiscal support since the 1990s, which has forced the organisation to step-up its business operations. In 1994, the BBC set up BBC Worldwide, a commercial subsidiary which operated in both domestic and international markets. In 1995, funding for the BBC Worldwide from the Foreign and Commonwealth Office was cut to £13 million pounds. In 1996, the BBC established the BBC Worldwide. The establishment of this institution was allegedly aimed at integrating BBC's international television business and commercial activities, and offering opportunities for rapid expansion. The BBC Worldwide is responsible for sales of magazines, radio and television programmes, books, and audio and video products. It also cooperates with private companies to develop its commercial network. Exploiting its brand reputation, the BBC has turned itself into a highly profitable and fast-growing corporate group.

After 2000, BBC Worldwide began its global expansion strategy. It joined the US cable network operator Discovery in a joint investment of $665 million into programme production and packaging promotion. BBC Worldwide's sales in the 2009–2010 fiscal year reached £1.07 billion,[5] making it a genuine international media giant.

[5]See http://www.bbc.co.uk/annualreport/download/index.shtml.

The BBC's international communicative capacity is not only a means for the UK to achieve its international political objectives, but also shows how a public service institution may be transformed into an international commercial media giant. Through leveraging its media brand, the BBC has opened global markets and extracted economic value from its own cultural products. At the same time, the BBC effectively resists the invasion of US-made mass cultural and industrial products, and maintains a positive position for the UK within international public opinion.

2.1.3 International Communication of Japanese Broadcast Media

Japan has a highly developed mass communication environment, and occupies a leading position within Asia. The Japan Broadcasting Corporation (NHK), the nation's sole public broadcaster, has played a pivotal role in this regard.

2.1.3.1 Adjustments and Changes in Japan's International Communications Strategy

NHK's international communications strategy has proceeded through three stages in the last two decades.

During the first stage in the early 1990s, NHK intensified efforts to enter the international market, leaning on its rich programming resources. During this period NHK began to change operational modes, moving from passive broadcasting of all kinds of programmes to actively selling its own programmes in the international market. It also set up a special subsidiary to specifically run this business. Because this approach was consistent with the interests of the Japanese government, it obtained significant state support in this endeavour. In the early 1990s, NHK began to broadcast its TV programmes in North America and Europe, where, amongst other offerings, animation and cooking programmes proved particularly popular.

During the second stage in the late 1990s, NHK stressed the importance of enhancing research and development efforts. It continually improved its international communications capabilities. As in many countries during this period, NHK invested heavily in the development of digital television. It also facilitated the development and application of other new technologies. The broadcasting of satellite television programmes and the development of new media were among the most remarkable achievements. In 1998, NHK officially launched its international TV channel. The viewing figures for its overseas satellite television programmes increased to 10 million in 2000. NHK's HDTV format was approved as the world's television production standard in 2000 and, in the same year, NHK launched its satellite digital TV broadcasts. The organisation can be credited with continually

exploring innovative operational modes using the Internet and mobile phone technology.

During the third stage of change, in the late 2000s, Japan yielded to pressure for English-language broadcasting within the international media environment, joining many countries which were launching English TV channels during this period. In 2007, the Broadcast Law was revised, laying the legal foundation for launching entire channels of all-English programming. In February 2009, NHK launched a 24-h international TV news channel in English to target foreign audiences. This can be regarded as a landmark event in the history of NHK's international communications.

2.1.3.2 Media Development and Convergence

Media convergence is extensive within Japan. The public can enjoy TV services via Internet networks. NHK TV and Fuju TV have launched mobile phone channels in recent years and the public can receive a number of online services via TV sets. Enabled by the *Development and Broadcast Law of the Telecommunication Business*, implemented in June 2001, a total of 21 Japanese telecommunication service providers have begun offering TV services. Japanese telecommunication companies generally adopt two ways to engage in TV broadcasting: one is to use the existing communication infrastructure, while the other is to use the Internet.

Such convergence has expanded the space for the development of Japanese international communications in the following three aspects. Firstly, as more telecommunication carriers have become involved in production, programme resources have become more abundant. Secondly, the audience scope has been expanded, offering an increasing number of overseas viewers the opportunity to watch all types of programmes produced in Japan. Thirdly, with the extensive application and development of new media technologies around the world, media convergence has diversified methods used within Japanese international communications and enhanced Japan's international communicative capabilities.

2.1.3.3 Organisational Structure and Operational Mechanisms

NHK's annual accounts, budget, and commercial plans must all be reported to the Japanese government. These must be reviewed by the Minister of Internal Affairs and Communications before they are submitted for approval to the National Congress.

NHK's Board of Governors is similar to a company's board of directors. The main responsibility of the Board of Governors is to survey annual management policies, business operations, budget decisions, administration plans and programming designs, amongst other operational aspects.

The Board of Governors is also responsible for deciding candidates for the positions of President, Vice President, and Executive Directors of the Executive

Board. It also oversees the progress of business policies and operations. Japan's Broadcast Law sets out detail around NHK's Board of Governors, its organisational structure and the appointment of board members. The board comprises 12 members with rich experience and knowledge. The governors are first approved by both the House of Representatives and the House of Councillors, and are then appointed by the Prime Minister. As the person responsible for the board, the chairman is elected by the Board of Governors itself.

NHK's Executive Board is responsible for daily management and decision-making, based on the rules established by the Board of Governors. Currently NHK's Executive Board comprises 11 individuals—a President, a Vice President, and nine directors. According to Japan's Broadcast Law, the Executive Board of NHK must review decisions made by the management committee, other issues considered important by the President, and associated business reports submitted by internal departments.

Other regulatory bodies within NHK include an Audit Committee, the Programme Broadcasting Review Committee, and the 'Commitment' Evaluation Committee. The Audit Committee monitors the implementation of business management and operations, addresses violations within the Executive Board, and investigates the income and property statuses declared by the Executive Board's members. The Programme Broadcasting Review Committee provides overall guidance on broadcast programmes to ensure soundness of programme content. In contrast to the previous two bodies, the 'Commitment' Evaluation Committee does not have statutory duties stipulated by the Broadcast Law. Rather, it establishes departments according to its own judgment of organisational need, and evaluates the implementation status and effectiveness of commitments made by NHK.

At present, NHK World · TV and Radio Japan, commonly known as NHK World, is composed of NHK World · Radio Japan, NHK World TV, NHK World Internet Service and NHK World Premium.

1. NHK World · Radio Japan (international shortwave radio)

NHK World · Radio Japan broadcasts in 18 languages—Japanese, English, Chinese, Bengali, Burmese, Hindi, Indonesian, Korean, Thai, Urdu, Vietnamese, Arabic, Persian, French, Russian, Spanish, Portuguese, and African Swahili—with the total daily broadcast time exceeding 49 h 20 min. Programme delivery is mainly by shortwave. Since regional features are also taken into account, Radio Japan also uses AM, FM, satellite broadcasting and other platforms to broadcast programmes. Currently, AM programmes cover Armenia and Moscow, whereas FM programmes cover Indonesia, Jordan, and Afghanistan.

2. NHK World TV

In 1991, NHK began to provide local companies in Europe and North America with TV programmes, and also broadcast premium TV programmes in Japanese via local satellite and cable TVs aimed at Japanese living abroad. Afterwards, the Japanese government partially revised the content of the Broadcast Law and proposed that international television become one of NHK's core businesses. As a result of the

new stipulation, NHK began to broadcast free TV for 3 h in Europe, and for 5 h in North America, every day.

NHK World TV has become a free English TV channel providing content for global audiences. The TV channel broadcasts global news and other programmes for 24-h every day. In December 2009, NHK added HDTV broadcasts to its original analogue TV programmes. In July 2011, analogue TV broadcasts ceased entirely.

As of March 2013, about 120 countries and regions across the world can watch NHK World TV programmes via local satellite and closed circuit TV services. NHK planned to be broadcasting to 150 million households around the world by the end of 2014. Currently, many NHK World TV programmes are broadcast from its website in near-synchronisation with the TV equivalent. By as early as February 2010, NHK viewers could watch live online TV via their smartphones.

3. NHK World Internet Services

NHK considers the Internet to be its third means of international communication, following TV and radio. NHK World Internet has launched websites in 22 languages, providing online programmes in near-synchronisation with daily radio and TV programmes. NHK World Internet began online uploads of all scripts from network and TV news in 2002 in order to provide viewers with the convenience of searching and reading those texts. In 2007, NHK launched a photo information release function on its Chinese website.

At present, NHK World Internet provides 24-h multi-lingual information services. With the popularisation of mobile network technology, NHK World Internet has also committed to the development and promotion of mobile news. After launching an English website in 2006, NHK successively launched websites in four other languages, namely Spanish, Portuguese, Chinese, and Korean.

4. NHK World Premium

NHK World Premium is a paid-for channel which broadcasts 5 h of news, drama, sports, and arts programmes via cable and satellite TV stations in North America and Europe. According to the Broadcast Law, Premium programmes must be different from those broadcast on NHK World TV. The former focuses on overseas Japanese audiences, with all programmes broadcast in Japanese, whereas the latter caters to local audiences in foreign countries, with all programmes broadcast in English. At present, people in about 100 countries and regions in the world can watch programmes provided by NHK World Premium. As the channel broadcasts programmes via cable TV and satellite TV stations, the content is often blocked by local radio and TV institutions. NHK has needed to sign local viewing contracts with such institutions in order to ensure its programmes are broadcast properly.

NHK's stated purpose is to provide the public with programs which enrich spiritual and cultural life. As a public broadcaster, NHK aims to maintain an impartial stance, free of interference from any party or individual. Although audience opinion is important, NHK does not measure success by ratings. NHK understands that the audience fees, through which it is funded, do not pay for programmes directly but contribute to the organisation's overall operation.

To sum up, through constant upgrades to media technologies and the process of media convergence, Japanese radio and TV have shifted away from one-way communication towards multi-channel and multi-language modalities. Meanwhile, aided by Internet, mobile and digital technologies, NHK has developed its own communicative capacity, enhanced programme quality, and expanded the influence of Japanese media in overseas markets.

2.2 Learning from the Macro Experience

After surveying the history and current condition of international communication within radio and television in the US, the UK, and Japan, we need to draw lessons in three macro areas: (1) international communication systems, (2) government planning, and (3) management, capital operation, and brand building.

2.2.1 International Communication Systems

Radio and television operate within an organisational structure which controls and restricts their activity and influence within wider society. The institutional structures of radio and television display different characteristics in different countries, and may be said to comprise distinctive models for the management and operation of such media. Such differences are reflected in institutional ownership, and the relationship of such institutions with government, amongst other factors. Next, we will analyse the character and structure of international radio and television institutions.

2.2.1.1 The Character of International Radio and Television Institutions

International communication institutions all over the world can be classified into three types based on their character. The first type is government-led radio and television institutions, represented by Voice of America (VOA). They are owned and operated by the state and have targeted audiences. The second type is commercial radio and television institutions, represented by Cable News Network (CNN) and News Corporation. The majority of western radio and television institutions belong to this category. The third type is public radio and television institutions, represented by the BBC and NHK. In theory, they are owned and operated by the 'public', and financially subsidised by government. In international

communications, these three types of radio and television institution coexist, each possessing its own unique advantages.

1. State-owned International Radio and Television Institutions

One of the advantages of state-owned international radio and television institutions is that they have the government's political and financial support, effectively guaranteeing their operation. Currently, there are only a few Western state-owned radio and television institutions—VOA and the BBC, for example—but they are mostly managed and controlled directly by government.

Let us examine VOA as an example. VOA is an international media institution, established by the American government and headquartered in Washington DC, with about 1,300 employees. Ever since its launch, VOA has benefitted from policy, financial and labour guarantees by the US government. Over the decades, the government has injected both money and manpower in an effort to build a vast international radio network covering every corner of the world, in particular socialist countries. In recent years, VOA's budget has increased annually, rising from $170 million in 2007, to $206 million in 2010 (Hu and Guan 2011, p. 70). Thanks to the government's huge investment and technical support, VOA has developed its international communicative capacity. In addition, the government has promoted international communications activities in an effort to boost America's national image within international media.

With international competition intensifying, all national governments around the world attach great importance to their country's image within international communications, and have encouraged their domestic media to venture out into the international fold. During this process, government normally prioritises policy support for official radio and television media in a bid to help their development.

2. Commercial International Radio and Television Institutions

Unlike government-led and state-owned radio and television institutions, commercial organisations are oriented to audience ratings and the concomitant economic rewards. In this regard they often bring innovative ideas to the field of international communications. Commercial radio and television institutions pay less attention to ideology than state-owned counterparts. Commercial media regard the international communications field as a lucrative market, rather than a battlefield of ideas.

Let us examine CNN as an example. CNN is considered the very first 24-h news channel and is well known worldwide for its globally-focused news broadcasts. On 1 June 1980, CNN's news channel started broadcasting to audiences around the world through a satellite wired transmission system, marking the rise of news-focused international commercial radio and television institutions. As the world's first global news network, CNN combines global satellite and cable television networks, and broadcasts 24-h news across the planet. As CNN was originally established as an international communications institution, it acted as a pioneer of international television institutions. CNN has won great influence and a strong global reputation. Over the years, CNN has successfully broadcast major international events, such as the attempted assassination of US President Ronald

Reagan in 1981, the UK-Argentina Falklands War in 1982, the Space Shuttle Challenger disaster in 1986, the fall of the Berlin Wall in 1989, the Gulf War in 1991, and the terrorist attacks on 11 September 2001. CNN has become America's most widely recognised news institution, the equivalent of the BBC for the UK. In some respects, CNN has become internationally synonymous with the USA.

Compared with state-owned institutions, commercial radio and television focus on news value in selecting news content and adopt a more implicit propaganda mode which, in turn, helps them to win international audiences. State-owned radio and television institutions rely on massive financial aid from the government, whereas commercial equivalents must make profits, which are mainly sourced from advertising. The hunt for advertising revenue has the effect of improving programme quality, the commercial value of which is realised through the 'secondary selling' of audiences. It is for this reason that commercial radio and television institutions are more like a service provider in international communications by giving maximum consideration to audience demands. In summary, commercial radio and television institutions are able to introduce new ideas, strategies, and vitality to international communications.

3. Public International Institutions of Radio and Television Communication

The concept of Public Service Broadcasting (PSB) is derived from Europe. In the western context, PSB is not profit-making nor directly controlled by national governments, but provides public service (Hu and Li 2010, p. 191). Compared with commercial radio and television institutions, PSB focuses on programme quality rather than profits. Like state-owned radio and television institutions, their financing is relatively stable, with funds drawn mainly from license fees, audience fees, government support, and other public funds. Thanks to their independence from advertising, public radio and television institutions feel relatively little commercial pressure. It is not their obligation to strive for advertising revenue and to compete for high audience ratings. They provide less propagandistic programmes than those of state-owned radio and television institutions, and feature more news and programmes around public affairs and culture. As a result, public radio and television institutions find it easier to win trust from the public on the basis of their perceived objectivity, fairness and credibility.

NHK exemplifies the point. As Japan's only public radio and television institution, it has played an important role in the country's international communication. NHK relies on audience fees, and receives further government subsidies for the development of its international communications business. It therefore enjoys significant advantageous over commercial radio and television institutions which must survive on advertising revenue. Thanks to stable audience fees, NHK can broadcast Kabuki, Sumo and other traditional Japanese arts and sports, with no heed to ratings. It therefore plays a vital role in popularising traditional Japanese culture among international audiences. Aside from specific programme content, NHK's public foundation helps to build a fair and reliable image in the mind of domestic audiences, and wins recognition from overseas viewers.

2.2.1.2 The Production and Broadcasting System

The production and broadcasting system in any given media environment reflects the relationship between producers and broadcasters. The mature systems that exist in the West offer lessons for China's radio and television media.

1. The Production and Broadcasting System of American TV Series

The US produces 75% of the world's TV programmes, and provides around 300,000 h of broadcast material to other countries each year. In many third world countries, the amount of television content broadcast directly from the US accounts for between 60 and 80% of total output. As Hollywood films have become increasingly formulaic and sterile, American TV series have innovated and grown strongly, with record-breaking audiences worldwide. They have also become popular over the Internet. American TV series have become an important part of America's cultural output. It is fair to say that their international success relies closely on the mature production and broadcasting system in the US.

The production process of American TV series has become highly industrialised and streamlined. Producers often select scripts that they believe have market potential, and aim to broadcast one episode each week. Scripts are generally created by teams; individual scriptwriters may be responsible for setting different plot points, and these are then wound together. Dozens of scriptwriters may be involved in the creation of any given episode of American TV. Storylines and characters may be revised on the basis of audience feedback during the broadcast period, with audience ratings a major indicator. The decision on which American TV series are broadcast is based entirely on audience ratings. New ideas are first piloted and continue on the basis of distinct 'seasons'. TV series with low audience ratings are unlikely to survive. In such a process, programmes that achieve a certain audience share percentage (generally 8–10%) will benefit from increased advertising and may receive additional investment funds. This in turn guarantees the series' quality, and a virtuous circle is formed. On the contrary, programmes that fail to meet a specific audience share percentage (generally about 5%) will experience the opposite outcomes, with the result that quality suffers and a vicious circle is formed. In the case of audience share falling below a minimum threshold of a particular TV station (usually about 3%), the series would likely be halted. Because this production and broadcasting system imposes continual pressure on American TV series, scriptwriters are always mindful of quality, and are receptive to audiences' needs and specific points of interest. These factors can help to explain the global popularity of American TV series.

2. Ratio Rules of the Production and Broadcasting System in the European Union

Europe boasts a rich historical and cultural background, a strong economy, a well-established social system, and advanced science and technology. These factors provide a positive environment for the development of Europe's international communications. Since its establishment, the European Union has been active in advancing the development of international communications in order to improve its

regional international influence and enhance its global voice. In terms of its production and broadcasting system, the European Union Commission has issued the Audiovisual Media Services Directive, and requires all of its member states to abide by its stipulations. According to the directive, the majority of programmes broadcast on any channel must be European programmes. Among them, more than 50% should have been produced in the preceding five years and more than 10% made by independent production companies. The ratio rules of the Audiovisual Media Services Directive guarantee the dominance of European television programmes within EU countries and effectively confront external market competition from the US and other national media powers. More importantly, the rules have helped to enhance the production capacity of local media producers, and have expanded programme exports and cultural influence to countries outside of the European Union.

3. The Production and Broadcasting System of Japanese Television News Programmes

Japanese television news programmes have a distinctive production and broadcasting system, which is of great potential significance to China's international radio and television institutions. Generally speaking, there are two overlapping production methods deployed by Japanese television stations. The first method is centred around presenters, and the second may be described as the news resource integration system. The former is implemented by all Japanese television stations, and involves a programme being jointly hosted by a core presenter, a secondary presenter, sports presenters, commentators, experts, and weather presenters. The core presenter plays a dominant role, while others fulfil different duties in the programme. This method allows every presenter to contribute individual expertise and facilitates the development of a distinct TV news brand. The news resource integration system mainly involves the integration of talent and news resources. Japanese television news programmes attach great importance to the integration of internal human resources, encouraging individuals to hold multiple posts and enabling specific talents to be developed and utilised, enhancing overall production. In addition, each TV station carries out 'resource sharing'.

Due to the demands of Japan's specific national conditions, NHK took the lead in setting up the 'emergency alarm and release system' on 1 September 1985. Subsequently, private TV stations also established similar emergency reporting mechanisms in an effort to meet the demand for the prompt reporting of emergencies. It is this system which allowed NHK to release speedy and accurate reports about the Japanese tsunami on 11 March 2011, enhancing its reputation within international communications.

2.2.2 The Macro Aspects of International Communications

In recent years, 'soft power' has become a key concept in the field of international relations. It has had a profound impact on the public's view towards international relations and reflects the importance and appeal of a country's culture, values, influence, and ethics. International television broadcasting is an important way of building a country's 'soft power' and national image. In the information economy, governments around the world have attached great importance towards the development of communications. The focus of governmental macro-control has historically been the domestic communication industry but today this process has incorporated global strategic concerns (Duan 2006, p. 132).

2.2.2.1 Governmental Policy Support

The development of international broadcast television cannot be conducted without policy support. This is particularly the case for those developing countries which remain in a disadvantaged position in the field of international communications. Let us take Al Jazeera—the first TV news channel in the Arabic world—as an example. It has become influential in international communications and attracts an audience of more than 50 million worldwide. In the Al Jazeera staff handbook, it states: 'Because of Al Jazeera, Arabic TV programmes are no longer the same as before'. Because of Al Jazeera, Qatar, a small country in the Middle East with a population of 620,000 and an area of 11,000 square kilometres, has becomes a great power in international communications. The success of Al Jazeera could not have been achieved without great support from the Qatari government, which invested $130 million in the organisation. This amount allowed the TV station to operate for five years without any economic pressure. In addition, the TV station enjoyed editorial independence, despite the general Middle East media environment being characterised by strict control and censorship (Liu and Qiao 2008).

Another similar case is the BBC. Because of the support given by the British government, the BBC has become a top international communications institution. The British government allocates a certain amount of funding to the BBC so as to promote its ideas and views. Since 1994, a succession of White Papers issued by the British government have made clear its interest in supporting the BBC so that it may participate in global market competition, and reflect British society's openness, cultural diversity and tolerance. The stance taken by the government in regards to its international communication industry has doubtless promoted the industry's development.

2.2.2.2 Industrialisation and Conglomeration

The industrialisation of radio and television refers to the transformation from 'ideological media' to 'industrially managed media', or, expressed differently, the move from cultural and spiritual production towards enterprise and business. The conglomeration of radio and television, on the other hand, refers to the optimised allocation of existing resources. In this process, radio and television achieve efficiencies in their use of capital, talent and resources, and expand the scale and enhance competitiveness through the pooling of resources. Industrialisation and conglomeration require the radio and television industry to operate in a business-like manner. This has undoubtedly brought great change to the broadcasting industry. Seeking cooperation and alliances in the global market has also become an important element in the development of industrialisation and conglomeration. Western countries have a long history in developing the industrialisation and conglomeration of their radio and television industries. China can draw upon their experiences and use them as reference points when it explores its own way of industrialising and conglomerating its broadcasting industry.

1. Industrial Management

The key of industrial management is to highlight the economic function of radio and television. If we closely observe the economies of today's developed countries, cultural industries represent pillar industries. The market- and business-orientation of these industries is mature. Several communications giants have established and defended their respective leading positions by relying on capital advantages and mature industrial management. Murdoch's news group—News Corporation— is an outstanding example in this regard. News Corporation was established through a series of mergers and acquisitions and its business now covers dozens of countries within the continents of North America, South America, Australia, Europe and Asia. Thanks to its excellent industrial management strategy, alongside its stable and highly-efficient financial management, News Corporation has become one of the world's largest and most internationalised media groups, and occupies a very important portion in the media market. It is no exaggeration to say that industrial management has allowed the radio and television industry to gain its preeminent position within international communication.

2. Establishment of Media Groups

In order to adapt to the increasingly intense competition within the international media industry, governments have encouraged media enterprises to adopt multi-level development strategies in an effort to create integrated media groups. Against this backdrop, large media groups have emerged and grown increasingly strong, deploying flexible management systems and increasingly sophisticated organisational structures. Time Warner is a fine example. With ownership of 24 magazines, it is the second largest publishing house in the world. Its music division is one of the largest music companies in the world, and it is a giant of global cinema. Time Warner also owns several American and global cable TV channels, including CNN, TBS, and HLN.

The establishment of integrated media groups has two distinct advantages in terms of international communication. First of all, such groups are able to produce rich content, an important commodity in today's dynamic global media environment. Secondly, because the strategy of integrated media groups is cross-regional, personnel structure, implementation strategy, capital mobilisation, and business activities are all carried out against an international backdrop. This can further facilitate international communication.

3. Building National Brand Image

Different understandings exist around the meaning of the term 'brand'. Brands can refer to specific trademarks or general reputations. It may be the image of a company's products, reflecting how that company is perceived by consumers. Certainly it is an intangible asset belonging to any given company. The American Marketing Association has defined 'brand' as follows: 'A brand (or a marque) is a name, term, design, symbol or other combination of those features that distinguishes one seller, or one seller's products and services, from those of its competitors' (Yu 2005, p. 3). But what does national brand image mean? From a macro perspective, national brand image refers to the impression formed by a country's internal and external public towards a symbolic 'brand' that reflects that country's politics, economics, culture, spirit, values and beliefs. From a micro perspective, national brand image can be found in the comments made by a country's internal and external public towards this brand (Wu 2009, p. 182). American scholar Peter van Ham first proposed the idea of national brands, specifically 'conducting the marketing of America like conducting the marketing of Nike'. In the era of global communication, the strategy of 'national public relations' is an important factor for enhancing national core competitiveness. Successful national branding increases an audiences' sense of recognition, emotion and value evaluation towards a specific country, which consequently enhances that country's international communicative capabilities.

The South Korean government has achieved much in terms of building a national brand. Korean Broadcasting Media has always maintained the aesthetic characteristics of oriental culture in its programmes. The movies chosen by the government to broadcast in international markets often contain historical themes that reflect Korean culture and history. At the world's largest film festival in Cannes in 2008, four historically-based Korean TV dramas were successfully sold to Japan (Hu 2011, p.62). KBS has developed programmes based on profound traditional culture that are nevertheless in line with the aesthetic and cultural tastes of large audiences, and has consequently won international recognition. By selling such media products overseas, Korea has not only established itself as a 'cultural exporter', it has also improved its national image. This image has become fixed in the minds of global audiences and has thus laid a foundation for the development of Korea's international communications.

2.2.3 *International Media Groups*

The international media groups referred to in this book have three characteristics: (1) they are international, namely, their business operates in more than one sovereign country; (2) they are integrated, namely, they are industrial organisations whose business straddles several different industrial media fields; and (3) they are conglomerated, namely, they are large in scale and power. With the globalisation of the world economy which has occurred since the 1980s, international media groups have gradually grown in terms of scale, power, and management prowess, particularly in light of the successive loosening of media control in the US and Europe. Around the year 2000, after continuous transnational mergers and acquisitions, international media groups such as News Corporation, Time Warner and Bertelsman began to play an important role in the field of international communications.

2.2.3.1 The Organisation and Operation of Media Groups

1. Organisational Structure

Organisational structure is of vital importance to media groups, and a scientific and clear organisational structure can greatly improve a media group's operational efficiency.

Leaving aside personnel and finance, the BBC's central business department consists of six major centres, namely the broadcasting centre, the production centre, the news centre, the international broadcasting centre, the global service centre, and the resources centre (see Fig. 2.1). In 2002, the BBC integrated its World Radio, World TV, and the external part of BBC online into a global news department. In 2005, the BBC established three new committees, namely, the cross-media innovation committee, the news committee, and the business operations committee. The news committee implemented unified management for all regional, domestic, and foreign news programmes for the first time since the founding of the BBC. Taken together, these adjustments helped the BBC's organisational structure become clear.

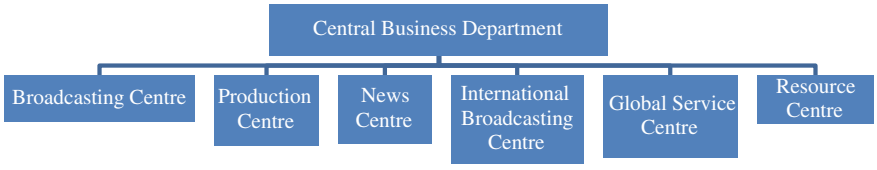


Fig. 2.1 The BBC's organisational structure

2. Operation

a. Transnational operation

The implementation of transnational operations plays an important role in improving international communicative capabilities and paving the way for international dominance. Bertelsmann AG is one of the four biggest media groups in the world, and is the biggest media group in Europe. Its business covers different media fields, including radio and television, publishing, and media services. In its radio and TV business, Bertelsmann AG merged Universum Film A.G. (UFA) and the Luxembourg TV Corporation (CLT) in January 1997, resulting in the birth of the biggest broadcasting company in Europe. CLT-UFA provides broadcasting services in Germany, France, Belgium, Holland, Luxemburg, the UK, Sweden, and the Czech Republic. In 2000, CLT-UFA and Pearson TV merged to form the Luxemburg Broadcasting Group (RTL), which consists of 22 TV channels and 18 TV stations in 10 European countries. The group produces 11,000 h of programming every year. Well-known programmes such as Baywatch, and Good Times, Bad Times, helped to establish the Luxemburg Broadcasting Group's leading position in the European market, and made it the first Bertelsmann subsidiary to be listed on the stock market. This transnational expansion not only brought economic benefits. It also enhanced the company's global visibility, narrowed the gap between its international audiences, and strengthened its international communicative capabilities.

b. Integrated operations

Surveying the development of global media industries, we can find that, having grown big in scale, all media groups begin to work across multiple media fields. Integrated operations can help a media group gain an advantageous position in international communications. It can bring benefits in the following three aspects. Firstly, integrated operations can help reduce production costs and increase the production scale of information products. Secondly, integrated operations can help with resource sharing. Newspapers, TV, radio, magazines, and even the Internet all share some similarities in terms of their production models. Sharing resources such as information, labour, technical equipment, and networks may raise production capacity. Thirdly, integrated operations can increase a media group's advertising revenue by allowing for the bundling of advertisement services.

c. Cross-industry operations

Cross-industry operations help media companies achieve the most efficient development and reuse of media resources and represent the most complete form of conglomeration. Today, the 25 largest media groups in the US all engage in the fields of radio, TV, newspapers, advertisement, audio and video production, publishing, film, entertainment, sports, and retail. Once the cartoon image of Disney's 'Mickey Mouse' became well-known, it was used to sell books, as well as other audio and video products. Since then, the image of the cuddly Mickey Mouse has been used across theme parks, furniture, food, clothing, toys and souvenirs. The

Walt Disney Company is an example of how the optimisation of industrial structure can greatly improve the competitiveness and economic success of a media group.

2.2.3.2 Management Strategies of Media Groups

1. Mergers and Acquisitions

Mergers and acquisitions have been commonplace throughout US media history. The US government began to loosen its control of telecommunications, radio and TV after the Federal Telecommunication Act (1996) came into effect. Since then, two trends have emerged. Firstly, the market is increasingly concentrated into the hands of a small number of media groups through the process of mergers and acquisitions. Second, the broadcasting industry has begun to externally integrate with other industries, including telecommunications and new media. The 25 largest media groups in the US may be described as information media groups and have gradually developed into transnational and cross-industry groups by merging with, and acquiring, companies outside America. News Corporation has existed for less than 50 years but today ranks number one in terms of media mergers and acquisitions.

2. Globalisation and Localisation

Adopting a 'going global' strategy is essential for any media group wishing to develop in the age of globalisation. Opportunities for doing so are provided by the advancement of transportation and communication networks, the free flow of information and economic resources between different countries, and the expansion of industrial capital across the world. After World War II, and especially since the 1970s, the transnational operation of media groups has become increasingly common. Surveying the best-known global media companies, it is clear that each of them has used a 'going global' strategy to expand their market share and increase their international communicative power.

'Localisation' is the most effective strategy for improving communicative effectiveness across different countries and regions. Implementation of this strategy allows information communicated to be more readily accepted by local audiences. 'Localisation' has two levels. The first refers to content. This is core to a media product's ability to attract audiences across different regions. The second level refers to the means of communication. Audiences from different social and cultural backgrounds have different encoding and decoding customs, and only content that is encoded in a way that conforms to local customs is likely to be accepted by local audiences.

It should be noted that 'going global' and 'localisation' are two sides of the same coin. Their relation is not contradictory, since 'going global' needs the support and coordination of 'localisation', while 'localisation' is an important constituent of 'going global'.

2.2.3.3 Brand Building of Media Groups

Just as a company needs to build a brand image around its products, media organisations needs to cultivate a brand image amid fierce market competition. A strong brand image is an important intangible asset of any media company, and it can be used by consumers to differentiate between goods of the same type, or even of the same quality, bringing economic and social benefits to those who produce them. Building an international media brand may increase the value of a media company, helping it to attract bigger audiences and increasing viewer loyalty (Chu and Wang 2011, p. 51).

Brand building strategy is an important element in improving the international communicative capability of broadcast media. Broadcast organisations such as the BBC, CNN and Al Jazeera have long been engaged in brand competition. Specifically, building an international media brand involves the following aspects:

1. Visibility

Visibility refers to the extent to which a brand is known and understood by the public. It also reflects the audience scope. Visibility of an international media brand is an important criterion by which to assess the influence of the media brand. Consumers are unlikely to form a positive attitude without first becoming familiar with any given broadcast media.

Building an international media brand requires advertising and publicity; more importantly, it needs consistent quality. Good media brands are often synonymous with high-quality media products. Broadcast media groups forge their reputation by disseminating high-quality programmes, and only those media brands that are able to consistently provide high-quality content build and maintain a positive reputation. HBO, ESPN, and the Discovery Channel are good examples in this regard.

2. Seeking a Unique Position

Obtaining a unique position entails acquiring market share based on an organisation's specific character and clearly differentiating oneself from competitors. If a broadcast media brand cannot differentiate itself, viewers will desert it. Schramm, in this respect, put forward a 'probability formula' on choice in media selection; that is, the 'likelihood of reward divided by the magnitude of effort required equals the probability of selection'. Using this formula, people tend to choose communication methods that best meet their needs. Nowadays audiences are highly segmented and every viewer has his or her unique needs in terms of media consumption. In such a context, building strong media group brands is increasingly important.

Let us examine the brand strategy of the three best-known broadcasting companies in the US, Columbia Broadcasting System (CBS), National Broadcasting Corporation (NBC) and American Broadcasting Company (ABC). In terms of news provision, CBS focuses on serious news, NBC emphasises its background analyses of news events; and ABC usually offers conventional 'hard news'. It is just these differences that distinguish one group from another.

2.3 Learning from the Meso Experience

Having discussed the macro experiences of western broadcasting media, this section will now analyse meso aspects such as human resources, channel building and audiences.

2.3.1 Human Resources

As a primary organisational resource, human resources directly influence and constrain the development and utilisation of other resources. High quality human resourcing has become an important force in economic and social development.

2.3.1.1 Cultivation of Talent in International Communications

No media organisation can be competitive within international communications without having top talent. The government, or other relevant institutions, need to offer regular training to people working in the media field, and this training must pay heed to the current requirements of international communications.

The situation in the US is instructive. The Chinese scholar Deng Jianguo (2010) has written about the vocational training of journalists carried out by the Poynter Institute for Media Studies. In his opinion, state support and the provision of unique curriculums are the two reasons why the institute has successfully cultivated media talent. As a journalism education and research institute, the Poynter Institute for Media Studies is exempted from federal taxation under Internal Revenue Service rules. This allows the institute to focus on the provision of 'journalism education', and frees them of financial worries. The institute attaches high importance to the diversity and practicality of its curriculums, which are usually customised based on trainees' backgrounds and needs. To date, the Poynter Institute of Media Studies has trained many notable journalists.

The BBC also attaches huge importance to the cultivation of talent. Most foreign presenters are offered language guidance, which helps them conform to local language norms in the reading of news. Presenters are able to accurately pronounce names such as Andry Rajoelina, a Madagascan leader who seized power in a 2009 coup, and Aleksandr Solzhenitsyn, the Russian writer. The BBC also offers its presenters the opportunity to serve as journalists overseas. Most regularly conduct journalism themselves, in addition to fulfilling presenting duties. Their diverse cultural contacts and regular interviewing experience allows presenters to better grasp international news.

2.3.1.2 The Development of Human Resources

Human resources are at the core of media competition. All major media outlets have their own foreign correspondents or foreign offices, as well as professional journalists, technicians and managers. Al Jazeera, the first English TV channel in the Arab world to target western viewers, is a good example. Even in an environment where western mainstream media dominate discourse, Al Jazeera has gained strong recognition among global viewers. It has enjoyed economic and geographic advantages but human resourcing is a contributing factor in its success. In order to compete with dominant news outlets such as CNN and the BBC, Al Jazeera has made great efforts to recruit well-known presenters and news journalists from western mainstream media. For example, the one-time BBC journalist David Frost —known for having interviewed seven US presidents and six British prime ministers—now works for Al Jazeera. These top media talents have added to the organisation's human resource strength and have, in turn, helped Al Jazeera raise its public credibility within international communications.

2.3.2 Channel Building

The improvement and expansion of content and channelling is integral to the international communicative capability of broadcast media. Advancements in digital and satellite technology have facilitated the unprecedentedly wide dissemination of radio and television programmes. The pressing question which arises is how an organisation may seize this opportunity to continuously expand its international market. The channel building experiences of overseas mainstream media provide lessons and insights.

2.3.2.1 Means of Entering the International Market

In the process of international communications, the constraints of geography, culture, and policy combine to disrupt the free flow of content. Non-Chinese mainstream media tend to opt for flexible and diversified means of entering international markets in the hope their content may be disseminated as widely as possible.

1. Cooperation, Mergers, and Acquisitions
News Corporation is a diversified, international media and entertainment company. Since the 1960s, it has conducted a number of mergers with, and acquisitions of, newspapers, TV stations, satellite networks, cable TV networks, and publishing houses across the world. Mergers, acquisitions, and integration can be regarded as News Corporation's representative operational strategy. The company first entered the British market by acquiring The Sun, and rapidly increased its market share in

the US by acquiring the New York Post. In terms of broadcast media, News Corporation successfully overcame local barriers through capital operations. In Hong Kong, for example, the company invested in several film companies before it acquired Hong Kong Satellite TV in 1992. Movies, and TV programmes produced by the company's local subsidiaries were ultimately shown on the channel, and operational integration was thus achieved, enhancing News Corporation's success in the region. News Corporation later tried to enter the mainland Chinese market by holding shares in Sky TV and Phoenix TV through flexible and diversified strategies.

2. Use of Distribution Platforms
Due to institutional and policy restrictions, it was very difficult for Viacom to secure distribution channels at the initial stage of its entry into the China market. In such a context, the Viacom Group—best known for content production—adopted flexible strategies to establish different types of cooperative relationships with traditional and new media organisations, and strived to make use of varied distribution platforms. For example, in 2013, Alibaba Group purchased 'Xiami Music' with an effort to jointly develop digital music.

3. International Exchanges and Collaborations
International exchanges and collaborations are also important means by which media outlets enter international markets. NHK, for example, provides free programmes in developing countries through its NHK International Foundation. To date, NHK has provided 66,889 international programmes to 139 countries and regions (Hu and Guan 2011, p. 129). In addition, NHK also actively participated in the joint production of news and other programmes with foreign broadcast media entities. In the 1980s, for example, NHK and CCTV jointly produced several documentaries, including *The Silk Road*. In 2009, NHK collaborated with the Hualu Baina Film Company to jointly produce the TV series *The Mansion in Heaven*. Such efforts helped NHK enter the Chinese market.

2.3.2.2 Industrial Chain and Market Extension

The Discovery Channel began broadcasting in the US in 1985 and today has become one of the fastest growing cable TV networks in the world. The Discovery Channel not only covers 99% of cable TV subscribers in the US but also has over 140 million family subscribers across 145 countries. The success of the Discovery Channel lies both in its superbly produced documentaries and also its ability to extend its market. The Discovery Channel is the biggest documentary production company in the world, with support provided by the following four subsidiaries: Discovery's US Dissemination Network; Discovery's International Dissemination Network; the Discovery International Company; and Discovery Theme Activity (Duan 2007, p. 80). The whole company revolves around the Discovery Channel's

core business. Such an operational system has resulted in the expansion of the channel's market, allowed the company to develop an industrial chain that extends from top to bottom, and ultimately won favour among international audiences.

2.3.2.3 Use of New Media in Expanding Distribution Channels

It is only by controlling distribution channels that media companies' ensure content reaches target audiences. In 2003, Rupert Murdoch's News Corporation acquired Direct TV, the biggest satellite TV company in the US. In doing so it captured the company's huge user base and expanding the distribution channels for its programmes. Network broadcasting is another means to expand distribution. It does so by making influential programmes accessible to bigger audiences. For example, Hunan TV's flagship variety show *Where Are We Going, Dad* started to broadcast merely on online platforms in 2016, but it still gained a total number of 2 billion watchers—ranked top 1 in comparison to other rival programmes. Such online dissemination ensures programmes gain wide audiences, and keeps production costs down and quality high.

2.3.2.4 Operations, Management, and Development

The Walt Disney Company's operational, management, and development model is the reason why it has gone from being a small cartoon production workshop in the 1920s to an entertainment and media giant today. Disney has four core businesses: product development, theme parks, film and TV production, and media networks (see Fig. 2.2). The company employs diversified operations and develops content across multiple platforms. For example, Disney first featured its Mickey Mouse and Donald Duck cartoons in film and TV series. It then produced toys and clothes based on these cartoon images and went on to publish themed magazines and build theme parks containing these characters. Diversified operations and multi-platform development increases production scale and quantity, lowers individual fixed costs, and ultimately increases sales revenue.

2.3.3 Audience

The audience refers to the recipients or receiver of messages in a communications process. International communications audiences are diverse and complex, drawn from various national and cultural backgrounds. The study of audiences is of special importance because they ultimately dictate the efficacy of communication. Major international media organisations, especially those in developed western countries, attach great importance to audience research. Their experiences are worthwhile learning from.

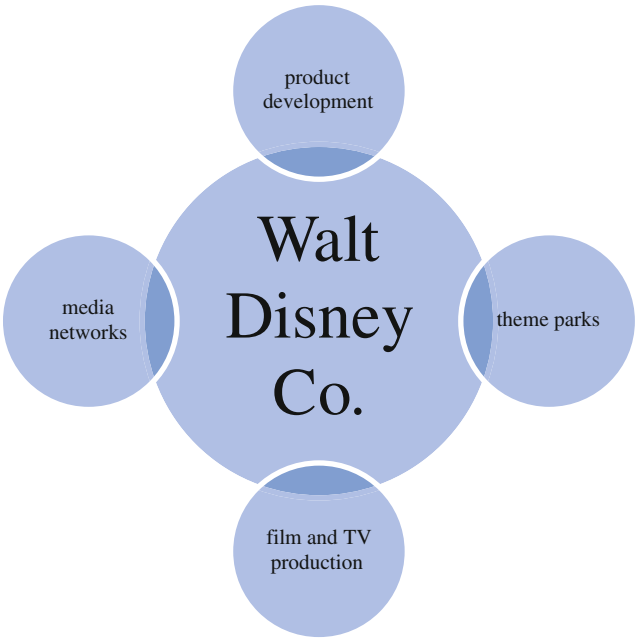


Fig. 2.2 The core businesses of the Walt Disney Company

2.3.3.1 Market Segmentation

Market segmentation is a common practice among western media groups and involves categorising audiences and delivering tailored messages within perceived market niches. Nickelodeon is a children's channel affiliated to the Viacom Group's MTV cable network and has the largest market share worldwide for children's programming. It was established in April 1979 and has the slogan 'Nickelodeon for children, all day, every day!' Nickelodeon's target audiences are children between two and 11 years old. It broadcasts daily from 6am to 10 pm with programmes running for up to half an hour. Because of the limited attention span of the two-to-five year-olds, Nickelodeon reduces the length of some programmes to between 15 and 25 min. Programmes attempt to understand the world from a child's perspective. The wildly popular programme *Rugrats*, for example, tells stories through the eyes of a baby. With its surprises and humour, the programme is loved by audiences of all ages. Because of their precise audience positioning, Nickelodeon's programmes are highly competitive within international communications. Currently, Nickelodeon conducts business in 149 countries and regions and

more than 300 million households can access its content through local cable TV, Nickelodeon's brand agents, or individual programme dealers.[6]

2.3.3.2 Audience Research

Audience research is the process of collecting and analysing audience information. Communication has always been a two-way process and audience research allows media groups to *receive* messages concerning the needs and requirements of its audiences, proffering improved overall communications. The American Broadcasting Management Committee included 'promoting citizen discussion and dialogue' in its 2008–2013 International Broadcasting Strategic Plan. The plan argues that 'dialogue' is the best way for international media to impress audiences and to realise the goal of communication, as opposed to the "monologue" of media' (Liu and Shi 2011, p. 269). In the 1920s, those countries which had relatively developed media industries set up foreign broadcasting stations. For a long while after, the only information broadcasters received on the popularity of their programmes was in raw listener numbers. By the 1990s, both television and the Internet had entered the field of international communications, with audiences becoming increasingly diverse. Consequently, the work undertaken to understand audiences has become more complex and the importance of audience research has gradually increased.

The BBC has set up the Department of Marketing, Communications and Audiences, specialising in audience research and audience contact; VOA has its Audience Contact Department, responsible for audience research and promotional work; and German national radio, Deutsche Welle, has three independent departments in this field, the Media Research Department, the Broadcast Monitoring Department, and the Customer Service Department. Radio France International (RFI) also has a research department that studies the organisation's worldwide audience figures and broadcasting impact. RFI additionally hires professional survey companies to conduct audience research 25–30 times every year across all continents and releases an 'Annual Audience Barometer' to track audience changes.

2.3.3.3 Strengthening Ties with Audiences

With audiences becoming increasingly complex, international media organisations have sought new ways to strengthen ties with consumers. Radio Japan has launched multiple publications addressed to international audiences, including its English magazine 'Japan Radio Message'. Additionally, it operates a gift catalogue distributed to those listeners who send in feedback. The channels for communication between international media organisations and audience members are not limited to

[6]See www.viacom.com and www.nick.com.

paper letters. Telephone hotlines, email contacts and online messaging using platforms such as Twitter have each been used to solicit feedback. The BBC, VOA, RFI and other major international media organisations work through on-demand, blog, podcast, email, mobile, RSS, Twitter, Facebook, and YouTube platforms. These methods offer broadcasting organisations instant and effective ways to strengthen dialogue with audiences.

2.3.3.4 Enhancing Audience Interaction

As the way in which consumers access media has changed, audience interaction has become an increasingly effective way for contemporary international media organisations to attract audiences and realise the essential aims of international communications.

BBC World launched its *Forum* programme in early 2003 to interact with global audiences. In 2004, the station staged a show called *Middle East Media Forum* which involved around 200 participants drawn from the cities of Beirut, Damascus, Cairo, and Rabat. The show attracted both attention and participation from audiences in the Middle East. Interactive programmes targeted at specific national audiences or language blocs are even more diverse in their forms. BBC World invites audiences to ask questions of guests on its programmes through blogs and hotlines. Dialogue platforms such as 'Hot Issue Discussion' for Arabic-speaking audiences, and 'Let's Talk About It' for Nepali-speaking audiences have attracted large audiences and consequently expanded BBC World's influence globally.

2.4 Learning from the Micro Experience

2.4.1 Communication Ideas

Currently, international television and radio is buoyant in the West and weak in China. Part of the explanation for this is the differences that exist in ideas around communications. International communications—the communication of information across cultures, nations, borders and regions—has its own unique rules and characteristics. However, China's international communications has for many years had the hue of 'policy propaganda'. This has severely hindered the development of its international communications. It's well worth reflecting on how China might move from propaganda to communication, while maintaining high standards and respecting communications conventions.

2.4.1.1 Establishing New Ideas in International Communications

The emergence of new communication technologies has broken traditional boundaries in mass communication media. The expansion of media groups and industrial chains, and the globalisation of communications are breaking the geographical boundaries of news, informational, and cultural communications. In this context, it is necessary to rethink the foundational concepts of international communications. For a long time, the mainstream concept within China's international communications was so-called 'international propaganda'. This one-way communications philosophy, characterised by an attitude of 'I speak, you listen', no longer fits the times. If we survey those foreign media organisations which have strong international communicative capabilities, it is clear they employ a multi-directional model, characterised by objectivity, neutrality, and audience-orientation. These may be regarded as the core values of 'international communication'. The building of 'international communication' values is essential to the development of the international communicative capability of China's radio and television industry. The transition from 'international propaganda' to 'international communication' is inevitable.

2.4.1.2 Stressing Accuracy and Truth

Accuracy and truth are particularly important qualities in international communications, especially in terms of news programmes. They are the lifeblood of radio and television and a means to win the trust of audiences. 'The nature of news is seeking truth. Truth is the fundamental principle of news. If the principle is violated, it will damage the reputation of the news agency, and trust will be lost among audiences'. News media is the main way that individuals come to know and understand the society in which they life and audiences have the right to obtain true information. Media that disseminate false information will doubtless lose credibility and damage their international reputation. Conversely, as long as news reports are characterised by accuracy and truth, they will improve the reputation of the media organisations which disseminate them. CNN is a good example in this regard. Its slogan changed from 'The World's Leader of News' to 'The Most Trusted Name in News'. CNN requires reporters to 'be knowledgeable' and to 'seek truth through investigation, investigation, and investigation' (Tang 2007, p. 73). CNN's pursuit of accuracy and truth has earned it a strong international reputation. It is thus clear that attaching importance to accuracy and truth is crucial in terms of international communication. It is important to emphasise accuracy and truth in all cultural media products, even outside of news reports. In this respect, Chinese radio and television organisations need to learn from western counterparts. China's international communications have long been seen as dictated by government and a propaganda tool, only dealing in positive information. This one-sided method of communication is outdated. Only when the real China is shown can its international communication win credibility and trust.

2.4.2 Communication Content

'Content is king' is as axiomatic to international communications as it is to domestic radio and television. Producing high quality, audience-oriented programmes is key to exerting influence on audiences.

2.4.2.1 Localisation of Content

An important aspect of the localisation of international radio and television communications is the localisation of content. This requires that radio and television stations adjust their programmes to suit the cultural and aesthetic standards of overseas target audiences. This localisation does not simply mean catering to the target audiences' tastes, but involves an element of cultivation too. CNN's attempts to localise programme content are instructive. CNN International offers four different schedules of programme based around region: CNN Europe, CNN Latin America, CNN US, and CNN Asia-Pacific. The four types of programmes have the same basic framework but different content to meet the different requirements and tastes of local audiences. The localisation of content has shortened the distance between media producers and local audiences. NHK often introduces Japan from the perspective of foreigners, an important element which has made its programmes popular overseas. One NHK's travel programme, *Tokyo Eye*, recruited a foreign presenter and let him describe Tokyo from his perspective. This strategy not only enriched the content but also saved costs and strengthened localisation.

2.4.2.2 Differentiation of Content

Unique resources often become strengths in international communications. Take Al Jazeera television, for instance. The Qatari organisation has experienced a rapid rise in recent years. In terms of production and broadcast techniques, Al Jazeera has no-doubt learned from the west, but it does not follow western methods entirely. It reports the Arab world in a very professional way and has developed its own journalistic terms and labels. News topics, agendas, and interviewees are independently decided. Al Jazeera particularly seeks out unique perspectives and reports news that is often ignored or neglected by western media. This differentiation of content has distinguished Al Jazeera and has thus attracted widespread attention from foreign audiences seeking to better understand the Arab world.

2.4.2.3 Refinement of Content

The refinement of content is key to the quality of international radio and television. In today's increasingly competitive media markets, agencies lacking refined

content are unable to grow. Clinging to the idea that "content is king", the BBC has long committed to producing high quality content in an effort to maintain and consolidate its brand image. Though the BBC has downscaled due to financial constraints in recent years, it has invested strongly in programmes such as Top Gear and MasterChef. The strength of the BBC brand, alongside the quality and innovation displayed in the programmes themselves, lead television stations from the United States and Australia to fall over each other in their effort to buy broadcasting rights.

Japanese media's pursuit of quality in international radio and television production is also worth studying. When China and Japan cooperated to shoot a documentary about the Yellow River, the chosen director was a Japanese professor from the University of Tokyo, expert in Lu Xun and modern Chinese literature, and somebody extremely knowledgeable about Chinese cultural symbols. Meanwhile, as a NKH director, he displayed lofty professional ethics. It took the director five years to complete *The Great Yellow River* (CCTV version: *The Yellow River*), a documentary characterised by the breadth of content, the depth of cultural sensitivity and the quality of production values. There is no doubt that such high quality media possess advantages in international markets.

2.4.2.4 National Cultural Characteristics

International communications must pay attention to national cultural characteristics. For example, responding to global concerns around food safety, NHK produced a series of programmes introducing Japanese food culture and teaching viewers how to cook traditional dishes. These programmes enjoyed great popularity among overseas audiences. Disney's animated films have also followed the principle. Except for a handful of original works featuring original characters such as Mickey Mouse and Donald Duck, most Disney movies are adapted from fairy tales, folk stories, or literary masterpieces from abroad. Disney does not make major changes to original storylines, but may add supporting characters to enhance dramatic and comedic effects, thus widening their appeal. The animated film *Mulan* is a retelling of an ancient Chinese folk story. This film has many Chinese cultural elements, but the leading character Mulan is injected with American cultural characteristics. In other words, the film only borrows the shell of the Mulan story, but the core protagonist is essentially American. In the film, Mulan displays a rebellious American spirit and uses American humour. Another example is DreamWorks's *Kung Fu Panda*. The film tells the story of a Kung Fu-loving panda who becomes a master of the Chinese martial art, albeit in a somewhat western manner. These strategies help the film overcome cultural barriers and are thus worthy of reflection.

2.4.3 Communication Methods

To achieve China's overall international communications goal, it is necessary to learn from the experiences of foreign media and to innovate new communicative methods.

2.4.3.1 Application of New Media

Though traditional media still dominate in terms of the formation of public opinion, new media are growing in importance. Traditional media have adapted to the new media environment and the integration of the two is gaining momentum. The change in media has also led to significant changes to communication patterns, methods, markets and effects. New online media are inherent carriers of global communication and are not constrained by national borders. Improving the international communications of integrated modern media organisations has become strategically important.

The BBC has set up a business division specifically for this purpose. The Future Media and Technology Division is responsible for developing new media and establishing new media platforms. The website of the BBC World Service presents world news in 33 languages and includes the core content of the station, in addition to relevant value-added derivatives. Thanks to the Internet, the BBC is no longer purely a radio and TV organisation, but rather a multimedia broadcaster and content provider. The BBC News website has become the sixth most frequently visited news site in the world and visitors from outside of the United Kingdom number almost double the population of the UK itself. The BBC's video library contains more than 500,000 h of programming, among which 60,000 h can be watched online.

France Internationale has also adopted the Internet and new media as a strategic response to increased technological competition. New communication channels such as Twitter, Facebook, MySpace and podcasting are not only important distribution channels for TV programmes but also means to strengthen the interaction between media organisations and audiences, and encourage audience participation. France International has cooperated with the YouTube and Dailymotion video networks to launch an online programme entitled *Internet Observer*, in which viewers can publish what they see and hear online, forming a space for citizen journalism and debate. Moreover, TV columnists have started writing blogs, increasing audience interaction.

It is worth noting that, in the field of traditional media, western dominance cannot be easily challenged. However, in the field of new media, especially international television, Internet media and next-generation media, developing countries have late-mover advantages. Al Jazeera is a good example in this respect.

2.4.3.2 Creating Rich Information Gathering Networks and Innovative Information Management Methods

With the development of international radio and TV, established stations have started to establish their own international information gathering networks. While still utilising the output of international news agencies, many have increased the number of overseas reporters, establishing unique informational resources. It is this worldwide news reporting network that has enabled international media to be regarded as the premier authority on international news facts. Only by establishing a rich information gathering network can radio and TV organisations obtain first-hand information and exclusively report international news.

To ensure timeliness, the world's leading media organisations have adopted innovative information management methods. Reuters, for example, has established a global information production mechanism based on process management. The nature of the mechanism is that it treats news as products which are produced by a series of working procedures. It quantifies the quality requirements of each procedure as controllable indicators and then organises, plans and controls the production process based on these indicators so as to ensure product quality and working efficiency. Reuters' journalistic process has both horizontal and vertical elements. The horizontal element includes the process of feedback-collection-processing-publishing-feedback, while the vertical element comprises three editorial departments of the London headquarters—Europe, Middle East and Africa; Asia Pacific; and North America—and a global network of 197 substations. Based on its information collecting and editing system, Reuters has formed a unique 'flat' news distribution system. After a report is completed, it only needs to be reviewed by one editor before being released to end users. This simplified distribution system means Reuters is able to deliver news quickly. Such a system may also be used by international radio and TV organisations. An information-gathering centre can increase the speed of communications.

2.4.4 Communication Technology

Significant and profound changes are taking place to the ecology and business structures of both domestic and international media industries. With communication technologies advancing with each passing day, increased technological investment appears a feature of the ongoing development of international radio and TV communications.

2.4.4.1 Technology's Role in Industrial Upgrading

The advance of communication technologies can enhance the impact of international radio and TV. In 2010, News Corporation released the film *Avatar* in the

IMAX format, resulting in a mass fervour for 3D movies. Mainstream international media organisations also attach great importance to the development of communication technologies. NHK, for example, founded the Broadcasting Technology Research Institute as early as 1930, and, in 1946, established the Broadcasting Culture Research Institute, the only large-scale radio and TV research institute in the world operated by a broadcaster. In 2009 NHK launched a three-year operating plan, spelling out how the organisation was to explore the multimedia space. Besides broadcasting, NHK disseminates information to audiences via the Internet and mobile devices. Meanwhile, VOA and the BBC place great emphasis on their overseas broadcasting stations. VOA has 31 broadcasting stations in total, 20 of which are overseas, as well as 144 transmitters; the BBC has 28 rebroadcasting stations, of which 23 are overseas, alongside 96 transmitters. In terms of global ground coverage, BBC has 400 medium- and short-wave FM stations, while VOA has 263, covering every corner of the world outside Western Europe and the United States. Science and technology are productive forces and technological development is the core driving force of industry. Technological innovation has made the allocation and operation of industrial resources increasingly efficient and promoted industrial upgrading.

2.4.4.2 Technology's Role in Promoting Digitalisation

Technology-driven digitalisation appears an inexorable trend in the development of international radio and TV communications. In 2000, News Corporation began implementing a comprehensive digitisation strategy, including the development of digital products, online newspapers, digitalisation and online transmission of programme content, and interactive video services. In 2005, News Corporation set up a new media business division, Fox Interactive Media (FIM), specialising in digital services. Its websites include MySpace, Photobucket, Fox Sports Interactive and IGN. In January 2007, News Corporation partnered with VeriSign and spent $190 million establishing Jamba, a company which provides entertainment content to mobile devices from suppliers worldwide.

2.4.4.3 Technology's Role in Expanding Communications Channels

The development of communications technologies can, to a great extent, expand communicative channels and coverage. Radio France Internationale's work in Africa is a good example. With the liberalisation of African media industries in the 1990s, radio broadcasting diversified and public, private, and religious radio stations emerged. Regardless of whether it operates in urban or rural environments, radio broadcasting is unrivalled by other media in terms of audience accessibility and potential influence. Accordingly, RFI developed ORDISPACE, a computer system by which programmes could be transmitted to African partners via the AFRISTAR satellite. Through the system, RFI can provide programmes to its

broadcast network partners in Africa, with stations across the continent able to receive RFI's video, text and image data. It took just two years for ORDISPACE to morph into a large African communications network comprising some 250 link terminals.

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Initial Observations

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