

行政院及所屬各機關出國報告

(出國類別：會議)

出席2010亞洲有線暨衛星廣播電視 協會年會報告

服務機關：國家通訊傳播委員會

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派赴出國地區：香港 (Hong Kong)

出國期間：99 年 10 月 24 日至 10 月 27 日

報告日期：100 年 1 月 18日

摘要

2010 亞洲有線暨衛星廣播電視協會(Cable & Satellite Broadcasting Association of Asia)年會於民國99年10月25日至10月27日在香港舉行，本會受邀參加該協會圓桌論壇及年會活動，為持續加強與該國際組織之合作關係，並增進瞭解區域監理對象之發展動態及經營策略，經核定由傳播內容處指派代表與會。

本次年會分監理者圓桌論壇(Regulator's Roundtable)及年會活動(CASBAA Conventions)兩大部分，會議主題為「解鎖你的網路」(Unlock Your Networks)，參加者有亞太地區監理者代表、有線暨衛星電視廣播業營運商、內容供應商、衛星服務、廣告代理商及相關學者等千餘人。

由於年會議程安排非常緊湊，會中所討論的議題範圍甚廣，本文係針對出席2010 CASBAA年會目的、參與監理者圓桌論壇及年會活動過程、心得及建議等提出報告，期能對相關廣電業務帶來助益。

出席2010亞洲有線暨衛星廣播電視協會年會報告

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壹、緣起與目的

一、緣起

本人因公赴香港兩次，第1次83年7月21日參加第5屆香港書展，尚在行政院新聞局出版事業處服務時；第2次即去(99)年參加2010 CASBAA年會。

兩度參與不同盛會，香港有什麼轉變？亞洲的平面與電子媒體，個人角度的觀察是什麼？相同一個人旅行，一樣來去匆匆，地點在隔鄰(香港會議展覽中心與凱悅酒店Grand Hyatt Hotel)，前者是亞洲出版業的盛會，後者是亞洲有線暨衛星廣播電視年會，不同活動與從業人員，相同熱鬧滾滾。

本會成立前，我在行政院新聞局工作，與廣電管理業務是平行線，所從事業務是國內外文宣、出版管理、媒體文化創意產業等。自93年調該局廣播電視事業處，從衛星廣播電視頻道輔導管理開始，歷經94年首次衛星廣播電視事業大換照，受命撰寫〈衛星廣播電視事業換照報告書〉¹，接著換至廣播輔導管理業務，直至95年本會成立後，擔任主任秘書室核稿(1年8個月)，再至傳播內容處督導他類視訊(網路、新媒體、有線電視及非無線非衛星頻道等)內容監理工作。

二、目的

本會受邀參加2010亞洲有線暨衛星電視廣播協會監理者圓桌論壇及年會(Cable & Satellite Broadcasting Association of Asia & CASBAA Regulator's Roundtable 2010，邀請函如附件1)，為持續加強與該國際組織合作關係，並增進瞭解區域監理對象之發展動態及經營策略，經核定由傳播內容處派代表與會。

這是本會成立以來，第4次參加CASBAA年會，前3次參與者及日期如下：

¹行政院新聞局網站 <http://info.gio.gov.tw/ct.asp?xItem=26768&ctNode=3875&mp=1>

| 日期 | 參與人員 | 處室 |
|-----------------|------------------------------|-------------------------|
| 95年10月24日至27日 | 石副主任委員世豪 周簡任技正永津 簡科長淑如 | 營運管理處 傳播內容處 |
| 96年10月28日至11月2日 | 何處長吉森 | 傳播內容處 |
| 98年11月2日至6日 | 何處長吉森 林簡任視察慧玲 簡科長淑如 | 傳播內容處 傳播內容處 傳播內容處 |

貳、出席年會活動過程

一、簡介

亞洲有線與衛星廣播電視協會(CASBAA)是亞洲地區重要的非營利組織，由亞洲128個經營付費電視業務的衛星及有線電視系統業者、跨國網路及節目供應者所組成，覆蓋30億人以上，致力於亞洲區推廣有線、衛星、寬頻和無線網路的資料傳輸等多頻道視像媒體的機構。主要任務如下：

(一)將亞洲地區的衛星、有線、無線廣播電視，有線寬頻影音及傳播業者結合成為致力提供訊息、推廣業界交流，並建立科技及標準作業流程，以便於提供更佳服務品質。

(二)推廣自由公平的市場、保護智慧財產權以及振興當地廣電產業的發展，致力於推動改進現行監理制度及其缺失，俾便符合當地及國際間傳播業者及民眾之利益。

(三)採取多項措施，包括智慧財產權的強制授權、推廣有線及衛星電視成為重要的傳播媒體、遊說、推動區域科技標準、監理者圓桌會議以及教育訓練研討會。為達成上述任務，乃透過遊說、促成區域科技標準舉辦年會、科技新知展覽、圓桌論壇、廣播及新媒體政策會議、發行刊物及教育訓練研討會等，對亞洲地區有線與衛星電視發展著有貢獻。

二、年會活動

(一)時間：99年10月25日至27日

(二)地點：香港凱悅酒店(Grand Hyatt Hotel)

(三)議程：有關詳細議程詳見附件2，或是CASBAA網站²

² <http://events.casbaa.com/convention/>

三、主要討論議題

CASBAA為亞洲區域付費電視業者組成之團體，每年定期對外舉辦相關活動就產業趨勢進行研討，本年活動於香港舉辦，年會主題為「解鎖你的網路」(Unlock Your Networks)，包含監理者圓桌論壇 (Regulator's Roundtable 10月25日) 及年會 (10月26、27日) 兩項，參加者為亞洲地區監理者、有線暨衛星電視廣播業營運商、內容供應商、衛星服務、廣告代理商及相關學者等千餘人。

(一)監理者圓桌論壇 (Regulator's Roundtable 10月25日)

- 1、主席：西門徐士敦戴維斯 Simon Twiston Davies (CASBAA's CEO)
- 2、主持人：休斯史帝芬 Hugh L. Stephens (時代華納企業 資深顧問
Time Warner Senior Advisor)
- 3、專題報告：寬頻網路與內容運用(Broadband Networks and Content
Availability)
- 4、報告人：查理斯瑞弗 Charles River (CASBAA 助理)
- 5、參與者：亞洲地區監理者、有線暨衛星電視廣播業營運商、內容供應商、衛星服務、廣告代理商及相關學者等千餘人(詳見2010
CASBAA年會活動網站)
- 6、討論議題(如附件3)：
 - (1)語言政策(Language Policy)
 - (2)寬頻網路與內容應用(Broadband Networks and Content Availability)
 - (3)內容管理政策(Content Regulation Policy)

本會議10月25日下午2點開始，會議室約為兩、三個房間打通，狹長會議桌之後，有幾排列席者，最後方是咖啡點心吧，會議桌坐的都是亞洲地區監理者代表(新加坡、澳洲、越南、泰國、馬來西亞、印尼、菲律賓、印度、巴基斯坦等)及國際頻道業者，我的座位右鄰是主席西門徐士敦戴維斯(Mr. Simon Twiston

Davies，CASBAA總經理)，他的右邊是會議主持人休斯史帝芬(Mr. Huge Stephens，時代華納企業資深顧問)，我左方是舒朗(Mr. Stuart Chiron，香港電訊盈科 PCCW 集團政府事務主管)、雷林碧玉(Ms. Belinda Lui，時代華納企業國際關係及公共政策亞太區總經理)，對面則是地主代表，香港特別行政區政府廖廣翔(Mr. Aaron Liu，商務及經濟發展局首席助理秘書長)。

因座位安排鄰近主席緣故，被點名第一位自我介紹及數次說明，全場介紹完畢後專題報告，接著是焦點議題討論，我簡述臺灣電視頻道的內容管理問題，以及回答有線電視的付費方式，會議從下午2時至5時，中間休息15分鐘，會議進行緊湊、有效率，各國代表皆能發言及交換意見。

(二)年會 (CASBAA Conventions 10月26-27日)

本屆年會主要演講和討論的內容，包括專題演講、專家環節，介紹將各平台、頻道、技術和夥伴之間關係連接起來，並透過探討目前挑戰和未來機會，研究如何進軍多頻道電視行業，闡述對付費電視行業的發展前景，探討未來區域內龐大的潛在商機，及為業界所帶來的重要啟示。

該協會除出版雜誌(CASBAA Conventions，如附件4)介紹年會相關活動外，專屬網站上(<http://www.casbaa.com>)亦有詳細會議活動報導，上載各項專題討論報告的實況影音短片及活動圖片等資料³，2010年會主要活動如下：

| 10月26日 (星期二) 大會第1日 | |
|--------------------|--------------------------|
| 0730-0830 | 早餐會報：三網合一的好消息與壞消息 |
| 0845-0900 | 開場演講 |
| 0930-1020 | 亞洲市場展望 |
| 1050-1120 | 與業者對話：MCCANN WORLD GROUP |

³ 同註 2

| | |
|------------------|---------------------------------|
| 1120-1210 | 電視新聞產業發展策略 |
| 1210-1300 | 內容創意與價值鍊 |
| 1400-1430 | 與泰國管制機關對話：TRAI |
| 1430-1450 | 與業者對話：ERICSSON |
| 1450-1540 | 行動市場展望 |
| 1610-1700 | 內容、通路與帳務、社會網路的媒體新典範 |
| 1700-1750 | 泰國媒介市場動態 |
| 1800- | 與業者對話：Disney、HBO、Fashion One |
| 10月27日（星期三）大會第2日 | |
| 0900-0930 | 開場演講 |
| 0930-1015 | 品牌中國 |
| 1015-1055 | 運動內容的疲態 |
| 1120-1140 | 與業者對話：MTV Network International |
| 1140-1200 | 與業者對話 |
| 1200-1240 | 廣告收益的前景 |
| 1345-1415 | 與業者對話：FOX International |
| 1415-1455 | 3D最前線 |
| 1455-1535 | 確保衛星所需的頻率 |
| 1600-1630 | 與業者對話：FOX International |

| | |
|-----------|--------------------------------------------------|
| 1630-1710 | 新平台上的新消費 |
| 1710-1750 | 眾所期待的新發展 |
| 1800- | 與業者對話：Universal Networks International、Discovery |

參、心得及建議

香港面積1,104平方公里，小於桃園縣(1,121平方公里)，約7百萬人口，是兩岸三地高度聚焦之地，海陸空四通八達，為商業、旅遊活動、國際金融與媒體中心，政治意味亦濃，走在地鐵出口、天橋上隨意即可見鮮明彩色海報：「釋放劉曉波及所有異見人士」(附件6、如圖8)，「退出共產黨，退黨總人數已達8,200多萬」(如圖9)，「台灣五都選舉考察計畫」及「2010北京文化創意產業交流團」(如圖10)等並列。

此次赴香港出席2010 CASBAA年會，更可親身感受其傳播媒體百花齊放，電子媒體、寬頻電視、手機通訊及網路娛樂蓬勃發展，國際傳播專業人士薈萃，香港紅塵4日所見所言所思，難以完整記錄，僅能就浮光掠影之想法摘錄如下：

一、心得

媒體匯流及數位化趨勢愈明顯，媒體內容呈現亦朝多元及分眾之特性，媒體文化重要性愈提升，相關內容監理及規則更複雜。亞洲是全球網路及手機通訊發展快速的地區，訂定合適管理規則，防止兒少接觸不當內容，影響其身心健康發展，並帶動當地媒體產業發展及文化提升，已是區域內各國政府、媒體事業、消費者共同關注的議題。

另外，隨著傳播媒體科技日新月異，傳播管道不僅多元且無遠弗屆，對監理者的衝擊及挑戰愈快速，例如在網際網路與傳統電視產業激盪之際，包括電視機上盒技術的發展，網路電視可能成為未來新興媒體的佼佼者。

99年11月11日華盛頓郵報報導〈網路電視戰爭已浮現在FCC面前〉⁴，臺灣亦面臨類似情況，自壹傳媒99年12月28日起，以免費租用機上盒方式提供民眾收

⁴ http://voices.washingtonpost.com/posttech/2010/11/changes_in_the_television_mark.html

看其電視節目，並提供VOD付費隨選視訊服務。此種經營模式類似中華電信MOD服務，惟壹電視本身提供機上盒，既是頻道平台，也是節目內容提供者，壹傳媒除了24小時播出壹新聞、壹綜合台，透過IPTV的形式，亦可提供隨選視訊(VOD)服務，不再只是單純的節目製播者。

另據99年12月30日網路新聞報導〈當有這樣的動畫時，誰還需要新聞？〉⁵現在已有一個方便新聞閱讀器，沒有複雜長篇大論，亞洲動畫公司壹傳媒（Next Media Animation）所製作的影片，可有效地摘要所有英國政治—媒體新聞重點，將最近幾週主要媒體報導，濃縮成85秒摘要動畫，節省你閱讀梅鐸大型併購案重要新聞的時間。

這是電腦動畫接合新聞媒體，呈現多元表現方式，過去傳播模式是藉文字、圖書、語言及印刷分別表述，上世紀則由廣播、電影、電視、相機、電腦、網路、手機輪番表現，未來的弄潮兒：寬頻、數位、3D、電子書、網路電視等即將掀起一波波傳播浪潮。

各式各樣新興媒體興起，未來電視大戰正開打，此時是檢視本會傳播內容監理的方向，對於跨國網路平台不當內容，影響兒少身心健康發展，應如何兼顧維護言論自由、保護兒少權益、加強業者自律、引進社會他律，及其他不合時宜法令如何鬆綁，在在考驗著本會監理作為。

二、建議

立法院於99年1月12日正式通過「政府組織再造四法」（行政院組織法修正案、中央行政機關組織基準法修正案、中央政府機關總員額法、行政院功能業務與組織調整暫行條例），預計101年1月1日起實施，將現有的37部會整併為29個機關。屆時行政院新聞局已屬整併機關(改為行政院發言人室)⁶，原有廣電輔導業

⁵ <http://www.guardian.co.uk/media/organgrinder/2010/dec/30/cables-loose-lips>

⁶ <http://zh.wikipedia.org/zh-tw/%E4%B8%AD%E8%8F%AF%E6%B0%91%E5%9C%8B%E4%B8%AD%E5%A4%AE%E8%A1%8C%E6%94%BF%E6%A9%9F%E9%97%9C%E7%B5%84%E7%B9%94%E8%AA%BF%E6%95%B4>

務勢將調整及轉移。

本會應乘此中央政府組織改造實施時，將現今監理及輔導政策分屬不同機關，易產生機關權責不清、業務職掌整合困難及行政效率不彰，導致棒子與胡蘿蔔相互扞格，難以推動有線電視產業數位化推動等問題予以闡明及解決，進而訂定完整、有效及良好的廣電產業政策。

因而，將廣電業務監理機關法規及輔導機關的輔導機制整合，方能有助於傳播通訊產業監理與發展，真正使電信事業以及廣播電視產業，發揮經濟規模與效應，營造健康的媒體競爭環境。

其次，綜觀亞洲各國政府管理網路電視的趨勢，不因有線電視與網路電視彼此間的競爭壓力，阻礙整體科技進步與發展；在傳播匯流、媒體數位化時代，政府的管制不再是嚴父家長、或者管太多的角色。例如英國通訊傳播委員會(Ofcom) 99年9月20日宣布將VOD內容管理任務委託給隨選視訊協會(ATVOD)⁷，這意味著ATVOD將接手處理英國民眾線性隨選視訊內容（即線性編播的節目）的申訴案件，提供隨選視訊服務的業者則必須履行其自律責任，此種借力使力監理模式，似可提供本會監理之參考。

未來本會面臨新興媒體與消費大眾求新求變的衝擊，監理思維應更開放，並思考如何用競爭、結構策略及鼓勵業者以自律、社會他律或是採取共同規範（Co-regulation）等方式，以達到監理廣電媒體節目及廣告內容之目的。

⁷<http://www.nma.co.uk/news/ofcom-hands-video-on-demand-content-regulation-to-atvod/3018391.article>

肆、結語

本人從事廣電事業輔導與監理業務已逾6年，撫今追昔，翻到5年前匆促所寫的〈衛星廣播電視事業換照報告書〉⁸，最後一章末兩段文：

未來通訊傳播委員會(NCC)成立後，對於廣電媒體的申設及換照審查業務亦有其公益責任，不會迥然有別，行政院新聞局卻不可在NCC成立之前，有任何執法上的懈怠，自應做好依法行政之本分工作，保障社會大眾的閱聽權益。

未來，傳播環境因數位技術成熟發展所帶動的科技匯流，使傳播、電信及資訊的整合迫在眉睫，現有廣電三法不足以因應「大媒體潮」的需要，爰此，行政院新聞局廣電處乃積極進行廣電三法的修法工作，並推動黨政軍退出廣電媒體、無線廣播電視及有線電視數位化、擴大無線公共電視集團，網站分級及網路業者自律計畫等業務，俾可調整過去的結構性扭曲，重建廣電產業的合理秩序。

整體情境雖已是朦朧的過去，當年嚴懲重罰(7家衛廣執照不予通過)之後，有否建立整體廣電產業秩序，營造公平競爭環境，落實媒體自律，朝向維護多元文化及保護消費者權益等目標，尚有待未來公論及檢討。

正如本屆監理者圓桌論壇出席代表一直強調的，電視媒體監理不可能有很完美的方法與績效(There is no quick and easy solution.)，前事不忘，後事之師，後之視今，亦猶今之視昔，這是本報告所以記錄香港匆匆行的感想，列述前揭心得及建議，盼給關心廣電監理及發展者，有所參考及助益。

⁸ 同註 1。

伍、附錄

附件1、CASBAA邀請函

08-SEP-2010 15:14 FROM CASBAA
Fax to 886-2-3343-7391
Page 1 of 9

TO 1666886233437391 P.01



Ms. Su Heng
Commissioner
National Communications Commission
Ren-Ai Rd. Office No.50, Sec. 1, Ren-ai Rd., Jhongheng District
Taipei City 10052, Taiwan (R.O.C.)

Dear Ms. Su:

I write on behalf of the Board of Directors of the Cable & Satellite Broadcasting Association of Asia (CASBAA) to invite you to participate in the CASBAA Convention and associated Regulators' Roundtable in Hong Kong on October 25-27, 2010.

CASBAA is Asia-Pacific's leading non-profit trade organisation for the promotion of multi-channel television via cable, satellite, broadband and wireless networks. CASBAA represents some 130 Asia-focused corporations, which in turn provide connections and content to more than 350 million households. (More information on our Association can be found below, or at www.casbaa.com.)

The CASBAA Convention is Asia's premier broadcasting event of the year, and gathers over 700 senior industry executives from across the region and worldwide for a three-day programme devoted to exploring the key issues facing the sector. The separate, closed-door Regulators' Roundtable brings together for a lively exchange of views a selection of officials from regulatory agencies in the 16 markets where CASBAA members operate, and leading executives of the industry. This year's Regulators' Roundtable will be held on the afternoon of Monday, October 25.

Discussions at this year's Convention will focus on the new prospects for digital media, as the rapid growth of pay-TV coexists with the internet. Sessions will explore online the ongoing development and growth of different media platforms in India, China, Thailand and Vietnam. Advertising and sports broadcasting issues will be discussed, and new technologies like 3D broadcasting will be explored.

The CASBAA Convention 2010 presents a powerful opportunity for regulators and senior industry executives to exchange ideas and strategies and discuss new trends that will drive businesses forward during and beyond these difficult times.

We believe that your agency's participation will be a highly valuable contribution to enhancing the dialogue between governments and the business sector. Please contact the CASBAA Executive office should you require any further information or clarification. Please contact our Regulators' Roundtable Coordinator, Annie Chu, for confirmation of your attendance. She can be reached at annie@casbaa.com.

We look forward to hearing from you soon.

Yours sincerely,

Simon Twiston Davies
CEO
CASBAA

請傳內處簽辦

蘇海子 0907



INTRODUCTION

Page 2 of 9 Attn: Ms. Su. Henry

CASBAA Convention 2010. Celebrating more than 20 years of Asian pay-TV growth.

Every day over a billion people view Asian pay-TV. It's the world's most dynamic ad and subscription market! Grasp the value of US\$30 billion a year in pay-TV subscriber revenues at the **CASBAA Convention 2010** from Monday to Thursday, **25 – 28 October** at the **Grand Hyatt Hong Kong!**

CASBAA Convention 2010 unites operators, content providers, satellite services, technology, telecoms services and ad agencies. Themed **"Unlock Your Networks"**, the Convention connects the dots between **Platforms, Channels, Technology and Partnerships**.

Platforms – What do 340 million diverse subscribers want from pay-TV? And how can it be delivered while growing ROI and ensuring future revenue? **Unlock Your Networks** and find your way at the Convention.

Channels – Pay-TV has changed the lives of more than a billion viewers in Asia. Find out why! Find out how! And drill deep into the whirlpool of next generation TV to find out what's next!

Technology – The Convention gathers the world's greatest technologies, relevant and sophisticated, designed for Asia. **Unlock the road to your successful digital pay-TV future.**

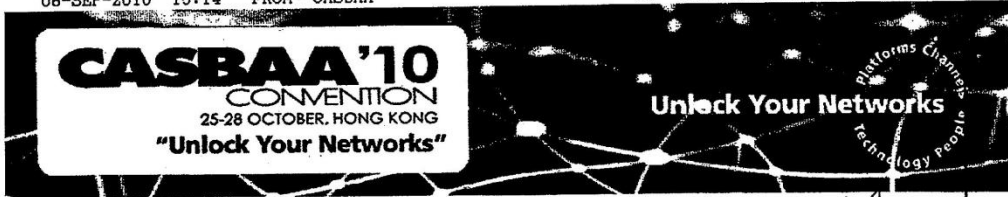
Partnerships - Do you know your partners?

Meet the operators, content providers, satellite and broadband services, telecoms and ad agencies leading our industry. Kick start 2011. Meet the people today, you need to know for tomorrow.



Fast Facts About 2009:

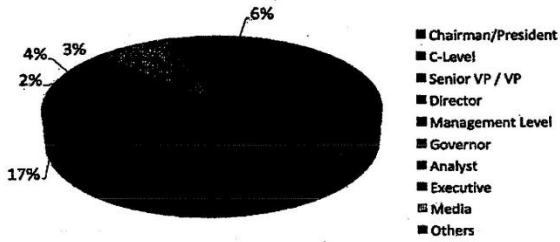
- Over 800 delegates
- Over 100 media
- 45 sponsors
- 43 media partners
- 28 supporting organisations
- 3 networking parties
- 1 golf masters
- 1 charity ball
- 4 sponsored breakfasts
- 2 sponsored lunches
- 10 exhibition areas



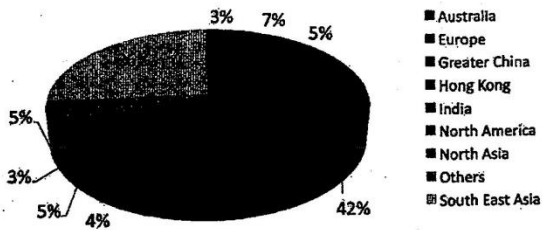
WHO ATTENDED IN 2009?

Page 3 of 9
Attn: Ms. Su Heng

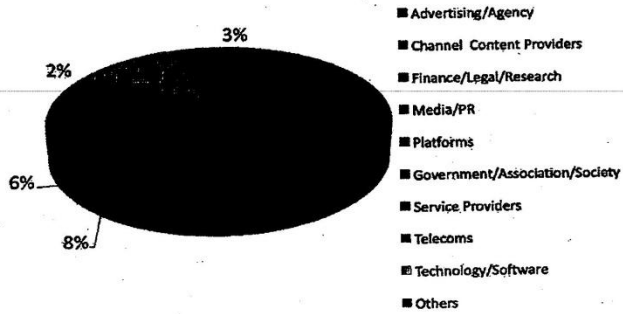
Decision Makers



Global Attendance



Industry Sectors





CASBAA CONVENTION 2009 SPONSORS:

Page 4 of 9
Attn: Ms. Su Heng



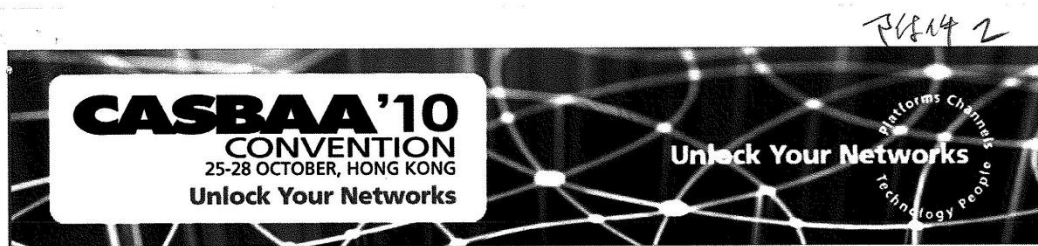
CASBAA CONVENTION 2009 - THE VENUE



Grand Hyatt Hong Kong
1 Harbour Road
Hong Kong

A local favourite for Conferences and networking events, the Grand Hyatt Hong Kong enjoys a central location in the heart of the business district on Hong Kong Island. The hotel is easily accessible by road and MTR and well connected to the airport via the airport express line, hotel coach link, taxi and limousine. It is one of Hong Kong's leading 5-star hotels with 5-star meeting facilities.

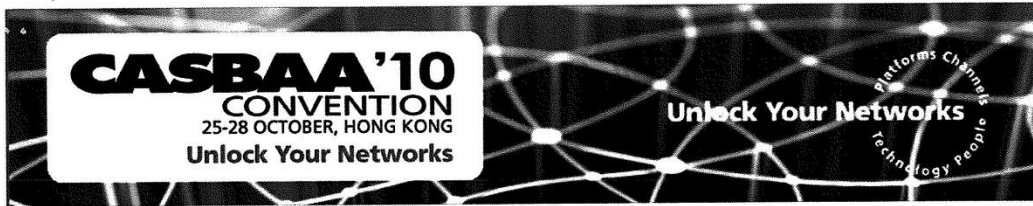
附件2、2010 CASBAA年會議程







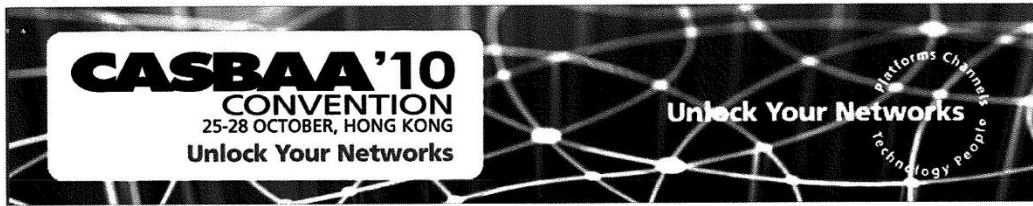
Preliminary Programme





| MONDAY, 25 OCTOBER 2010 | | |
|-------------------------|----------------------------------------------------------------------------------------------|--|
| 7:00am – 4:00pm | Eurosport CASBAA Golf Masters <i>Open to registered golf players</i> | |
| 8:00am – 9:30am | Women Media Networks Breakfast <i>By registration only</i> | |
| 2:00pm – 5:00pm | Regulators Roundtable <i>By invitation only</i> | |
| 6:30pm | Speakers Reception <i>By invitation only</i> | |
| 8:30pm | CASBAA FRANCE 24 Opening Delegates Cocktail Party <i>Open to all registered delegates</i> | |

| TUESDAY, 26 OCTOBER 2010 Grand Hyatt Hong Kong | | |
|---------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--|
| 7:30am – 8:30am | Sponsored Breakfast | |
| | Paul Weiss: Regulatory Updates Convergence of Three Networks: Good News / Bad News | |
| | Breakfast Unlocked: Synovate unveils the latest in consumer trends and opens the door to a billion viewers in Asia Pacific. | |
| 8:45am | The Opener Marcel Fenez, Chairman, CASBAA; Global Leader, Entertainment & Media Practice, PricewaterhouseCoopers | |
| 8:50am | Welcome Remarks Henry Tang Ying-yen, Chief Secretary for Administration, Hong Kong SAR Government | |
| 9:00am | Opening Keynote Michael Burns, Vice Chairman, Lions Gate Entertainment | |
| 9:30am | The Network <i>Opening Remarks:</i> Tomoyuki Morizumi, President & CEO, Jupiter Telecommunications (J:COM) Where are the latest digital market opportunities for carriers and content (higher ARPU/controlled investment) and how do we successfully capture them? What are the most viable platform business models to maintain sustainable growth? With: Louise Sams, President, Turner Broadcasting System International Sean Cohan, SVP, International, AETN International Rudy Tanoesoedibjo, CEO, Indovision Tzu-Han Huang, President N Taiwan, Chunghwa Telecom | |
| 10:20am | Coffee Break | |



| | | |
|---------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------|
| 10:50am | <p>In Conversation with Nick Brien, CEO, McCann Worldgroup with Marcel Fenez, Chairman, CASBAA; Global Leader, Entertainment & Media Practice, PricewaterhouseCoopers</p> | |
| 11:20am | <p>Newsflash! Making it, Fixing it, Selling it, Managing it. What strategies are securing audiences as the TV news industry evolves? Is the 24 hour News Cycle affecting values and how are issues such as security and trust being addressed in the region.</p> <p>With: Christine Ockrent, COO, FRANCE 24 K V L Narayan Rao, Group CEO & Executive Director, NDTV Al Anstey, Director of Media Development, Al Jazeera Katherine Green, SVP of Programming, CNN International</p> <p>Host: Tara Joseph, Executive Producer, Reuters Insider, Asia, Reuters</p> |  |
| 12:10pm | <p>Media on the Move Asia Pacific is the world's largest mobile market. With a CAGR projected at 13% over the next five years, will crossing 3 billion subscribers by 2013 be easy?</p> <p>With: Han Willem Kotterman, Chief Strategy Officer, Strategy & Business Development, CSL Christian Cadeo, Head of Brand Advertising, Asia Pacific, AdMob at Google Safdar Mustafa, Head of Mobile Media, Al Jazeera Ali Zamiri, Director of Business Development, Qualcomm MediaFLO</p> <p>Host: Nicholas Wodtke, VP, Business Development & New Media, Disney Media Distribution Asia Pacific</p> | |
| 1:00pm | <p>Networking Lunch</p> | |
| 2:00pm | <p>HARDtalk JS Sarma, Chairman, Telecom Regulatory Authority of India with Mishal Husain, BBC World News presenter</p> |  |
| 2:30pm | <p>In Partnership: Ericsson</p> |  |
| 2:50pm | <p>Creativity and the Value Chain "Rules of the Content Kings" – insights from the creators, owners and distributors of television programming on shows, audiences and ultimately money!</p> <p>With: Arjen van Mierlo, CEO, Endemol Asia Robin Nayak, Regional Head of Strategy - SE Asia, TBWA/Tequila John Leahy, COO, Astro Entertainment SB Jef Lim, Head of Programming & Production, Tiger Gate Entertainment Michael McKay, President, Active TV Greg Moyer, President, Scripps Networks</p> <p>Host: Janine Stein, Publisher & Editorial Director, ContentAsia</p> | |
| 3:40pm | <p>Coffee Break</p> |  |



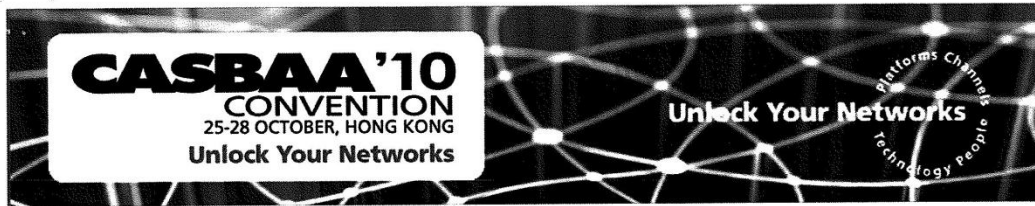
| | | |
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| 4:10pm | Unlock Your Networks While Broadcast Networks own content assets, Telecom Networks own access, delivery and customer billing relationships, Social Networks also play an increasingly important role in the new media paradigm; how should the three work together in this new delivery and interactivity paradigm where you may beam content to any screen? With: Bob Zitter , EVP, Technology & CTO, HBO Janice Lee , EVP, TV & New Media, PCCW Chris Maier , Director, Digital Operations, Millward Brown International Todd Miller , EVP, International Networks, Asia Pacific, SPT Paul Mitchell , GM of Policy & Standards, Entertainment & Devices Division, Microsoft Host: Taras Bugir , Director of Product Marketing, Oracle |  |
| 5:00pm | The Kings of Speed <i>Opening Remarks:</i> Tanawat Wansom , President, MCOT Thailand's satellite and cable TV services now reach almost 30% of households and Vietnam's pay-TV industry has enjoyed almost 400% growth in the past five years. Both broadcasting landscapes have changed dramatically in such a short time, how are the players shaping up? With: Byrd Bunnag , Territory Head, Thailand, Fox International Channels Sompan Charumilinda , EVC, True Visions Ngo Thi Bich Hanh , VP, Vietnam Media Corp Host: John Medeiros , Deputy CEO, CASBAA |  |
| 5:50pm | Day 1 Closing Remarks | |
| 6:00pm – 7:30pm | Disney Media Distribution Cocktail Reception Venue: 11/F The Pool house, Grand Hyatt Hong Kong |  |
| 8:00pm | HBO Private Party <i>By invitation only</i> |  |

CASBAA '10
CONVENTION
 25-28 OCTOBER, HONG KONG
 Unlock Your Networks

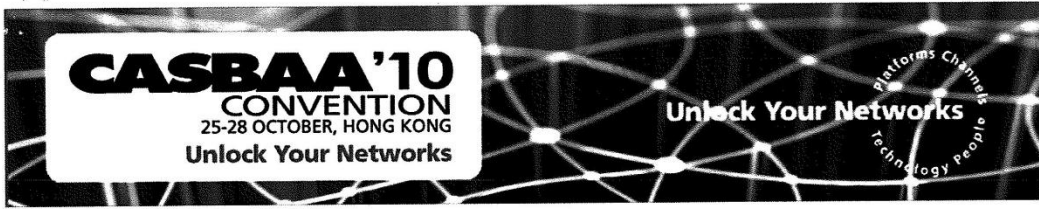
Unlock Your Networks



| WEDNESDAY, 27 OCTOBER 2010 Grand Hyatt Hong Kong | | |
|-----------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------|
| 7:30am – 8:40am | Breakfast | |
| 9:00am | The Opener Marcel Fenez, Chairman, CASBAA; Global Leader, Entertainment & Media Practice, PricewaterhouseCoopers | |
| 9:30am | Brand New China <i>Opening Remarks:</i> Gary Wang, Founder & CEO, Tudou.com With more than 160 million cable TV households and 60 million digital homes in China, the industry is faced with many challenges, not least, piracy, intrusive regulations and trade restrictions. How can pay-TV providers increase subscriber revenues and deliver a wider choice of quality content? With: Tao Libao, CEO, DOXTV Francois Aubaniac, VP, Operations & Business Development, China, Nagravision Host: Michael O'Neill, Editor, Campaign Asia-Pacific | In Association: campaign |
| 10:15am | Who's Playing Away? Sports television is one of the key drivers of subscription TV in Asia. Is it still the most profitable or is the cost of content and fragmentation of the audience lowering the demand for sports channels? With: Andrea Radrizzani, Group CEO, MP & Silva Scott Levy, SVP & MD, NBA Asia Alexandre Callay, Director, Eurodata TV Worldwide Breck McCormack, Principal, World Media Solutions Braden Clarke, MD, Asia, SPORTFIVE Host: Ian Carroll, EVP, Turner Broadcasting System Asia Pacific | |
| 10:55am | Coffee Break | |
| 11:20am | Keynote Robert M. Bakish, President, MTV Networks International | |
| 11:40am | In Partnership: Irdeto Graham Kill, CEO, Irdeto | irdeto |
| 12:00pm | Advertising on the Loose While global broadcast and cable networks search for new ways to monetize content beyond the traditional TV screen, marketers are determined to squeeze the best value out of the full range of new media opportunities. What effect is this having on ad revenues in Asia? Who can maximize? What are the risks? Who will win? Who will get left behind? With: Jed Meyer, MD, Media Services, Greater China, The Nielsen Company Paul Haddad, SVP, Media Data & Advertising Solutions, Concurrent Neil Stewart, CEO, Asia Pacific, Maxus Raymund Miranda, MD, Asia Pacific, Universal Networks International Host: Simon Murray, Principal Media Analyst, Informa Telecoms & Media | |



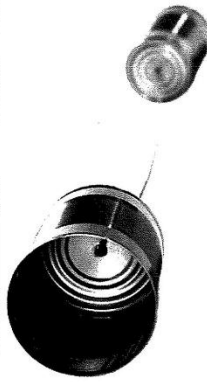
| | | |
|--------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--|
| 12:40pm | Networking Lunch | |
| 2:00pm | 3DTV - On the Front Foot In less than two years, 3D technology has experienced major developments in the movie industry. Consumer interest in 3D is now pushing key players to establish 3DTV networks. How are global pay-TV operators making 3D content work in the home? What needs to be done to take 3DTV to the masses? | |
| 2:45pm | Satellite Television: Up in the Air Long-haul C-band satellite services account for the majority of content distribution across Asia even though fibre optic networks are now used extensively throughout the region. But pay-TV's essential C-band is now under serious threat as governments increasingly look to quick fix revenues from spectrum auctions to terrestrial players. With: Bill Wade , CEO, AsiaSat David Ball , Regional VP, Asia Pacific, Intelsat Paul Brown Kenyon , COO, Measat Lior Rival , Deputy CEO & VP, Sales & Marketing, RRsat Elias Zaccack , VP, Sales, Asia-Pacific, SES World Skies | |
| 3:35pm | Coffee Break | |
| 4:00pm | In Conversation with Punit Goenka , CEO, Zee Entertainment Enterprises Limited (<i>invited</i>) with Steve Marcopoto , President & MD, Turner Broadcasting System AP (<i>invited</i>) | |
| 4:30pm | What's Behind the Screen? As we unlock our networks, we leverage next-generation technologies for content delivery as we move through the digital ecosystem. PCs and mobile devices have permanently blurred the line between "TV" and video. Technologies and platforms are changing the way content is consumed and distributed – from set-top boxes and IPTV systems to mobile phone applications and the world of web television. With: Rob Gilby , SVP & MD, Disney Media Distribution Asia Pacific Steve Oetegenn , Chief Sales & Marketing Officer, Verimatrix Suzanne Johnson , Director of Marketing for Media & Entertainment, Akamai Technologies | |
| 5:10pm | The Show Stopper What developments of innovative content and technological wizardry can consumers expect moving forward? Visionaries from the Global entertainment space give us their insights into the future. | |
| 5:50pm | Day 2 Closing Remarks | |
| 6:00pm – 7:30pm | Universal Networks International Cocktail Reception | |
| 8:00pm | Discovery Private Party <i>By invitation only</i> | |
| 10:30pm until late | Fashion One Late Night Private Party <i>By invitation only</i> | |



| THURSDAY, 28 OCTOBER 2010 | | |
|---------------------------|------------------------------------------------------------------------------------------------------|--|
| 11:00am | CASBAA AGM <i>For all CASBAA Voting Members. By invitation only</i> | |
| 1:30pm | CASBAA Council of Governors <i>CASBAA Council of Governors Meeting. By invitation only</i> | |
| 7:00pm – 1:30am | Turner presents the CASBAA Charity Ball <i>Open to all Charity Ball ticket holders</i> | |

Note: CASBAA may alter or cancel the sessions, content, speakers and timing of the convention programme without any prior notice.

08/13



**Broadband Networks and
Content Availability**

CASBAA Regulators' Roundtable

October 2010

CRA Charles River
Associates



Significant development in broadband but networks underutilised...

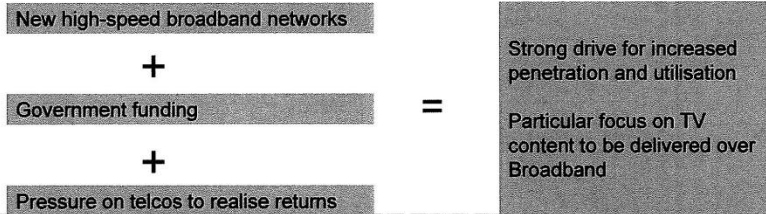
| Issues | Questions |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <ul style="list-style-type: none"> • Strong pressure for TV content to be delivered over broadband • Some telcos and regulatory authorities considering using regulatory levers to force content owners to unbundle their content | <ul style="list-style-type: none"> • What are the key differences between the telco and content industry? • What policies can be adopted to increase utilisation and take-up of broadband? |

Should content be regulated in a similar way to telecoms? What are the risks?

2

CRA Charles River Associates

Pressure to realise financial and social benefits from broadband investment...



| ...considerations |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <ul style="list-style-type: none"> • Content and telco industries brought together "by circumstance" – technology convergence • Totally different business models and legacy regulatory environments But... <ul style="list-style-type: none"> • Some common practices in the content industry are often prohibited for incumbent fixed-line telcos (exclusive dealing and bundling, for example) • Incumbent telcos and regulators may see these practices as ripe for challenge |

Is a dose of "telecoms medicine" just what the industry needs?

3

CRA Charles River Associates

**What are the key differences between telco and content industries?
(1)**

| Inherent Differences | | Difference in commercial practice and regulation |
|----------------------|--------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------|
| | Telco | Content |
| Upstream | Undifferentiated Standards based | Differentiated, key determinant of customer choice |
| Industry Value Chain | Relatively speaking, clear, logical distinction between upstream and downstream components | Blurred distinction between content, channels, packaging, branding and marketing, IP rights |
| Economics | Tendency towards "natural monopoly" (some exceptions) | No tendency towards "natural monopoly" in content |

Telco

- Detailed economic regulation, applied "ex ante"
- Strong unbundling of network elements and services
- Required bundling often prohibited at retail level for dominant players
- Strong rules preventing exclusive dealing

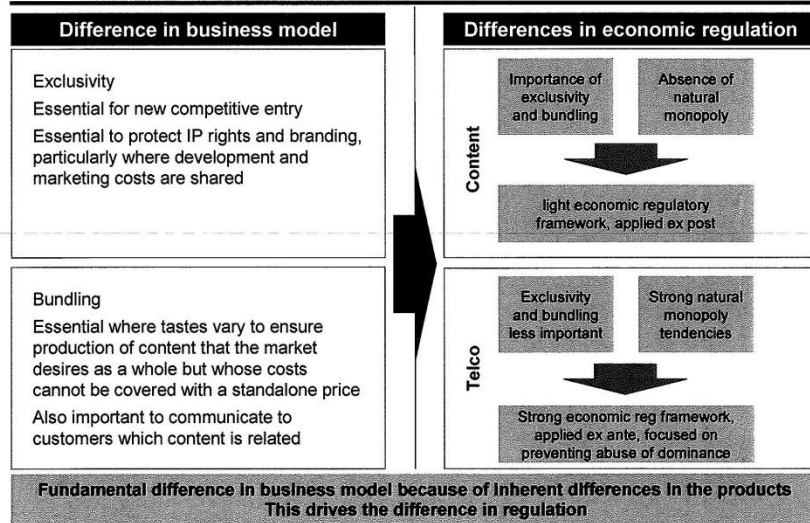
Content

- Strong relationships between content owners and distributors covering many angles, including marketing, channelisation, packaging and branding
- Extensive use of bundling both at retail and wholesale level as a means of distributing content
- Frequent use of exclusive contracts
- Economic regulation more "hands off", applied "ex post". Generally confined to vertically integrated players enjoying a dominant position

4

CRA Charles River Associates

**What are the key differences between telco and content industries?
(2)**



5

CRA Charles River Associates

Other Industry Examples

| Bundling | Exclusivity |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <ul style="list-style-type: none"> • Bundling of newspaper sections, eg news, sports, business, etc. • Bundling of software applications, eg Microsoft Office, Adobe Creative Suite, bundled applications within operating systems • Restriction of iTunes to use only on Apple devices • Calling plans in mobile telephony • Loyalty discounts | <ul style="list-style-type: none"> • Exclusivity almost universal in publishing. Publishing houses commission authors on an exclusive basis • Launch of the Apple iPhone was exclusive to one operator per country • Exclusive games to promote new console platforms • Exclusive distribution and franchise agreements for automobiles <p><small>Exclusivity is the rule rather than the exception in FTA television. A channel buys a program from a producer with the explicit condition that it will not air on competitor networks. This is how FTA operators acquire "eyeballs" to boost ad-supported business.</small></p> |

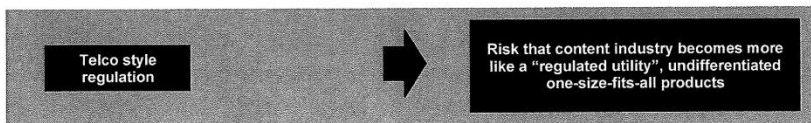
These practices can be extremely powerful ways of achieving valid commercial objectives, eg allowing simpler pricing, simplifying choices, facilitating product launch etc. Their extensive use in TV content mirrors that in many other industries

6

CRA Charles River Associates

Potential risks of applying telco style regulation to content industry?

| Application of detailed telco style regulation | Innovation | Competition | Content availability | Local content production |
|------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------|
| | <ul style="list-style-type: none"> • Reduced investment in platforms due to perceived risk of "free-riding" • Reduced investment in content and IP due to perceived risk of "free-riding" | <ul style="list-style-type: none"> • Reduced competitive entry by new platforms • Reduced competitive entry by new content providers | <ul style="list-style-type: none"> • Take-up lower so prices must increase (or production must cease) • Lower availability of content with niche appeal eg having cultural or educational value • Reduced availability of globally produced content | <ul style="list-style-type: none"> • Reduced incentives for local content production |



7

CRA Charles River Associates

What alternatives are available to optimise use of new broadband networks?

Building content supply on broadband networks

Opportunities presented by broadband

- Knock-on impacts on the high-tech economy
- Catalyst for other services eg education, government services and healthcare

Risky, "short termist" approach

- "Telco style" forced unbundling and prohibitions on exclusive deals will not be a good answer
- Interfering with an established business model inherently high risk



A more sustainable approach

- Content naturally flows to where there are "eyeballs"
- "Competition law approach" legitimate where there is genuine dominance
- "National interest" programming lists that content owners are required to make available are legitimate

Other approaches

- Promote e-government/commerce, education, healthcare on b-band
- Promote broadband take-up to create "critical mass"
- Facilitate telco competitors within the broadband market

8

CRA Charles River Associates

Summary

- Significant investments in broadband have led to dramatic increases in capacity and availability
- But broadband networks are currently underpenetrated and underutilised leading to substantial political pressure to demonstrate that efforts and money invested yield public benefit
- Also, telcos are keen to find a way to monetise their investments
- Due to the perceived urgency of the situation, some telcos and telco regulators are keen to pursue a telco style regulatory policy towards the content industry by insisting on unbundling and ending exclusivity arrangements
- The hope is that this will lead to content proliferating over broadband networks more quickly than otherwise
- Such an approach is thus an inherently risky approach. Risks include a reduction in content availability and a reduction in new competitive entry
- There is no "quick and easy" solution for shifting TV content onto broadband networks, but a number of initiatives can be put in place to encourage it in the long-term
- A variety of initiatives should be considered to encourage other productive uses of broadband networks

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Discussion Topics
CASBAA Regulators' Roundtable
October 25th, 2010

1) Language Policy

Different governments have different policies with respect to use of local languages on pay-TV. Some want to incentivize subtitling and dubbing, as consumers are demanding more local-language content. Others seek to restrain local-language versioning of international content, perhaps to give local producers a competitive edge. As the Asian pay-TV industry grows, channels and platforms are seeking to find the right mix of local content and international programming; how do governments decide the right policy framework to promote growth and meet consumer demands?

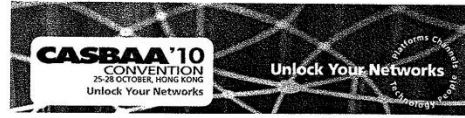
2) Broadband Networks and Content Availability

Governments are rightfully concerned to encourage the development of broadband networks to bridge various "digital divides." Pay-TV programming has provided an essential stimulus and helped secure private financing for construction of huge and successful broadband networks in some countries. In others, public money is being spent to build or subsidize national networks. But the business models and regulatory principles governing broadband networks are very different from those concerning content: "Unbundled" access and universal interconnection are the rule in telcoms, but in content, bundling and exclusivity are necessary for the industry to thrive. What issues does this pose for regulators, and what alternative approaches should they consider?

3) Content Regulation Policy

Governments are grappling with the issue of how to ensure broadcasting meets content standards appropriate to different societies and mores. What works best? Operator self-regulation? A large government censorship body? Or something in-between these two poles? In the age of growing broadband connections, how does content regulation in pay-TV relate to handling of the same content on the Internet?

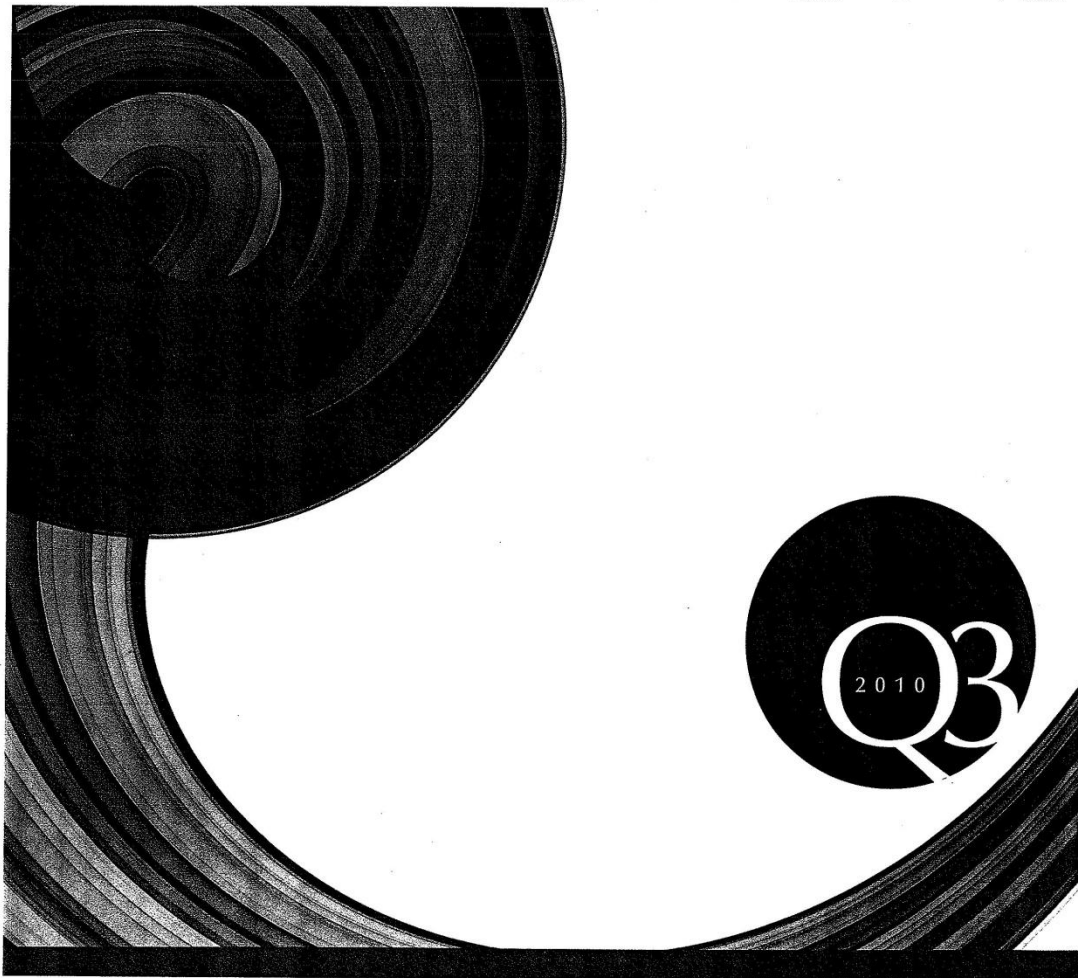
附件4、2010 CASBAA雜誌封面及目錄



- 附件4
CONVENTION 2010: GET A SNEAK PEEK
ONLINE VIDEO: CLEANING UP IN CHINA
CHANNEL BUNDLING: BALANCING ACT
SPORTS RIGHTS: BEYOND FOOTBALL

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CONNECTIONS



C O N T E N T S

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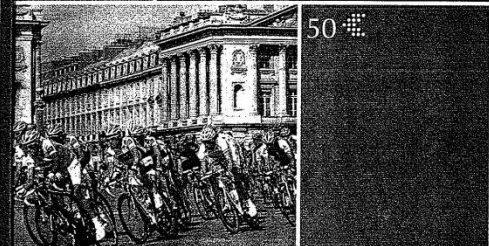


23 Internet
World Cup viewers double in four years



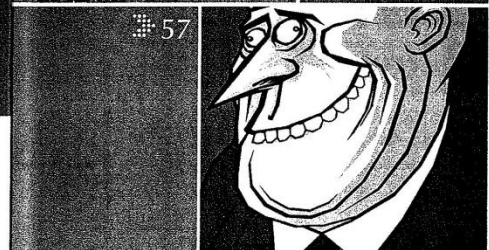
24 Convention 2010
A sneak peek at what's coming in October

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- MTV: There's life in linear
- McCANN: The future is in the East, right now
- J:COM: Pulling younger viewers back to TV
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Bigger and bigger and bigger and bigger

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What's keeping media execs up at night

Volume 5, Number 3

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附件5、CASBAA CEO 謝函

附件 5



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Dear Mr Hsu,

I write on behalf of the CASBAA Board of Directors to thank you for participating in the Regulators' Roundtable at CASBAA Convention 2010. We sincerely hope that you enjoyed and benefited from the Roundtable, and from the wide range of discussions and activities at the Convention.

We covered a wide array of interesting issues, and the meeting was made all the more rewarding thanks to your involvement and support. Thank you for giving your time and sharing your insights.

We have prepared a summary of the discussions at the Roundtable; you will find it attached for your information. (In keeping with the off-the-record groundrules for this event, no names of participants are included.)

We look forward to keeping in touch with you throughout the year and – we earnestly hope – to welcoming you back for CASBAA Convention 2011!

My best regards,

A handwritten signature in black ink, appearing to read "Simon Twiston Davies".

Simon Twiston Davies
CEO, CASBAA

P.S. There were no pictures taken at the Regulators Roundtable, but with respect to the Convention itself, many of the photos and presentations are now available on the CASBAA main site. Later, edited videos of the Convention panels and speeches will also be posted, for the benefit of your colleagues who were not able to attend. In the meantime, please visit the following links to review the week that was!

[CASBAA Convention 2010 Photo Gallery \(Oct 25th - 26th\)](#)

[CASBAA Convention 2010 Photo Gallery \(Oct 27th - 28th\)](#)

Summary of Discussions
Regulators' Roundtable – CASBAA Convention 2010
25th October, 2010

1) Presentation on “Broadband networks and Content Availability” by Charles River Associates

- Significant development of broadband networks is underway, but some networks are underutilized.
- New high speed broadband networks + government funding + pressure on Telcos to realize returns on private-sector investments become strong factors in creating perceived need for increased penetration and utilization. This leads to a particular focus on TV content to be delivered over Broadband.
- Differences between Telco and content industries explained: content industry more differentiated, with a blurred distinction between levels in the value chain. There is also no tendency (in content supply) towards “natural monopoly”.
- Key differences:
 - Content industry: exclusivity and bundling are well-established commercial practices and very important to competition and innovation, natural monopoly is absent and this leads to a light economic regulatory framework.
 - Telcos: Exclusivity and bundling are discouraged by “universal service”-type philosophies and “dominant carrier” regulation; has strong natural monopoly tendencies. This favours a strong economic regulatory framework, applied ex ante, focused on preventing abuse of dominance.
- Different business models drive the difference in regulation.
- Applying telco style regulation to content industry is risky as the content industry could become more like a regulated utility offering undifferentiated one-size-fits-all products.
- There is no “quick and easy” solution for shifting TV content onto broadband networks, but a number of initiatives can be put in place to encourage it in the long-term.
- A variety of initiatives should be considered to encourage other productive uses of broadband networks

Ensuing Discussion

-
- A participant described the situation in Singapore (where the regulator has proposed to sharply curtail exclusivity and constrain bundling) as exceeding complex. The mandate for “cross-carriage” had created a lot of uncertainty as to how it could be implemented in practice. Bundling and exclusivity were important issues, but there were also many others, including the effect on owners’ IP rights of carriage by third parties (who might not protect the content), and whether innovation and differentiation would be cut.

- There are currently two regulatory agencies in Singapore, which had very different philosophies and ways of managing competition. Would the situation be improved if the regulatory agencies were converged? The presenter from Charles River Associates noted that convergence of regulating bodies is on the increase; this is a breakthrough in regulatory affairs but it means that regulators are increasingly handling industries with very different economic models. From an institutional point of view, this prevents competing regulators fighting against each other, but there is a need to avoid looking at both industries (content and carriage) through the same lens.
- Several participants described the situation in other markets. Hong Kong has several hundred channels on offer; at the low end consumers pay approx. 100 HKD/month. The government's principle: to provide a "light touch" regulatory environment for the industry. In India, there are over 500 channels in India, with most covering general entertainment rather than any particular niche. Most of the population doesn't watch over 20 channels. Exclusivity is not allowed and there is little incentive to develop niche content. It is therefore important to look at the licensing aspect of channels as well as content pricing, if innovation is to be stimulated.
- In Australia, the government is reviewing its antisiphoning list (reserving 1300 sporting events for free-to-air operators). The government is also spending \$43 billion on the national broadband network and in that context it is important to watch what happens to the intellectual property rights of contents. Australia has a history of excessive regulatory intervention (compare the 1300 events on the antisiphoning list, with the very limited number of events on European lists). The disproportionate regulatory approaches suggest that a wary eye should be kept on the Australian government.

2) Language policy

After an introduction by the moderator, participants discussed the language policies in place for various markets.

- Vietnam is seeking to increase localization (dubbing or subtitling) of international contents. The government wants it, and operators are seeking more localized content.
- New DTH operator VSTV has 30 international channels out of a full bouquet of 72, and only 12 are localized. Most localized content is available for only 2 – 3 hours per day. The most localized channel has 16 hours of subtitled shows.
- Localization needs to keep pace with growth, and also is necessary to stimulate further growth. The penetration of pay-tv is on the increase, and is expected to reach 2 million homes connected. Most Vietnamese cannot understand English and there will have to be localization.

- In India there is a 1.2 Bn population with 25 states where 16 dialects/languages are officially recognized.
 - However, there is no government mandate for language policy.
 - The language problem is immense, as versions cannot be presented in just one language because some states with their own dialects are significant.
 - Most subtitled programmes would give subtitles both in English and Hindi
 - In the regulator's point of view, there is no need for regulation because market forces will drive language versioning.
 - The market has noted that ZeeTV's regional bundles, for example, have heavy subscription numbers and local news content is especially popular.
 - Therefore, the great force that may draw the attention to localization is the high revenue that localized contents generate.
-
- In Singapore, subtitles are encouraged, though not in Chinese dialects.
 - Government policy restricts the availability of dialects.
 - Recently, the government rejected loosening of regulations on dialect channels (as proposed by its own Censorship Review Committee, saying the loosening was unnecessary
-
- In Indonesia, government policy requires operators to provide 10% local channels. These are by definition in local language.
 - For international channels it is important to localize with Bahasa Indonesia subtitles in order to win viewership. This is also encouraged by the government.
 - There is no significant amount of programming in any local dialects.
-
- Similarly, in Thailand localization is a must in order for broadcasters to raise revenue, because Thais can neither speak nor listen to English.

3) Pay TV Regulatory Approaches

At the request of the moderator, an Australian participant described the "co-regulation" scheme in vigour for content in that market.

- The co-regulation framework in theory minimizes regulation and encourages self regulation.
- Industry bodies develop codes of conduct, which are enforced by government supervision and regulation.
- The government renews the code every 3 years and calls for public comment.
- Other government regulations focus on ownership of content and incentives for local investment in content production.

Discussion then ensued about practices in other markets.

- In India, regulation of content has been a contentious issue. Various governments have proposed constraints on content, while broadcasters have always opposed having them in place
- In reality, sometimes the media engages in practices that makes the situation more difficult, including the news coverage of the 11/26 Mumbai attack.
- It is important that the media takes responsibility and takes heed on sensitive collective issues while fulfilling the mandate of a free press through responsible reporting.
- Broadcasting organizations in India (the News Broadcasters Association and the Indian Broadcasting Foundation) have adopted codes of practice, and public complaints about content have dropped 60% since the implementation of these codes.
- This may have reduced political pressures for government-imposed regulation. The government, however, continues to look at reducing the scope for non-serious (and potentially irresponsible) players to enter the broadcasting industry.
- Regulatory approaches in Thailand have been complicated by the ongoing political struggles.
- NTC has very limited authority to regulate satellite broadcasting. To improve content supervision, it is important for the NBTC to gain control.
- Increasingly, telecom technology (and telecom licenses/concessions) are being used to deliver programmes. Existing regulations are not applicable to that content therefore authorities lose control.
- Taiwan has an extensive system of government regulations.
- There are already very detailed regulations in place to protect children, regulate different types of content, but the real question is: can the industry regulate itself?
- Some channel operators appear to be seeking to evade government regulations by distributing unlicensed channels over the internet.
- In most other places there is a regulatory disparity with regard to content delivered over the internet.
- This is also true of Hong Kong. The HK government uses a technology neutral approach so TV content can be delivered in any forms which should be decided by the market players.
- But content on the internet in Hong Kong is totally unregulated while content provided by other means does have some constraints.

The moderator closed the discussion with thanks to all participants.

附件6、2010 CASBAA 年會活動照片



圖1：監理者圓桌論壇報到處

圖2：監理者圓桌論壇會場



圖3：監理者圓桌論壇會場

圖4：監理者圓桌論壇會場上參與者名牌



圖5：報告人在監理者圓桌論壇會場

圖6：年會活動現場



圖7：年會活動場所(凱悅酒店Grand Hyatt Hotel)

圖8：地鐵MTR出口，民主黨海報—釋放劉曉波及所有異見人士



圖9：灣仔最長天橋，法輪功海報—退出共產黨(退黨總人數已達8,200多萬)

圖10：地鐵MTR出口，第11屆青年政治學堂海報—台灣五都選舉考察計畫