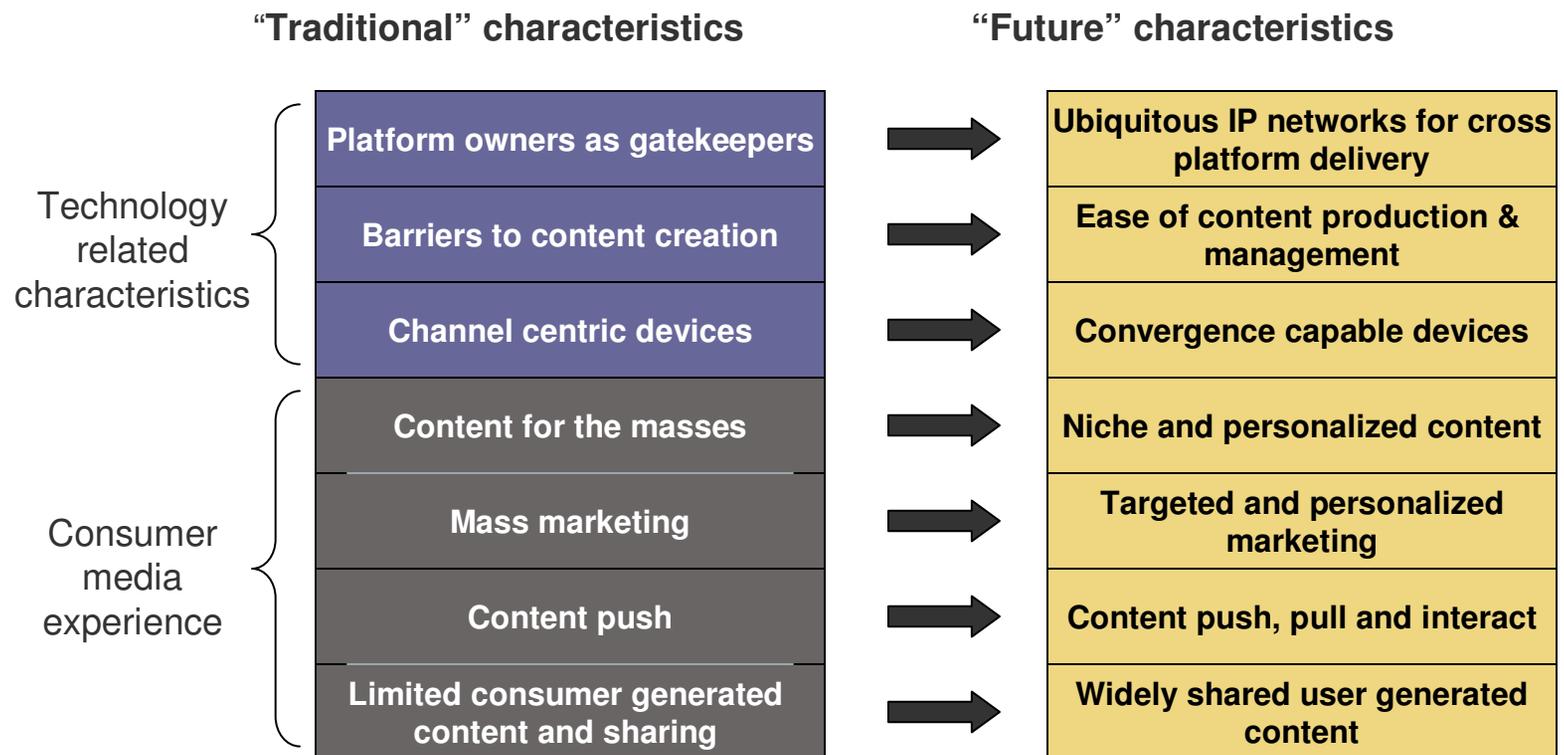# REGULATING THE CHANGING FACE OF ELECTRONIC MEDIA IN JAMAICA

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Broadcasting Commission Retreat
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BROADCASTING
COMMISSION

Media market trends

"Traditional" characteristics

"Future" characteristics

Technology related characteristics

Platform owners as gatekeepers	→	Ubiquitous IP networks for cross platform delivery
Barriers to content creation	→	Ease of content production & management
Channel centric devices	→	Convergence capable devices

Consumer media experience

Content for the masses	→	Niche and personalized content
Mass marketing	→	Targeted and personalized marketing
Content push	→	Content push, pull and interact
Limited consumer generated content and sharing	→	Widely shared user generated content

Source : ITU/EBU
2007-06-22

Defining the New Media Landscape

- Evolving and ever-changing in light of:
  - Globalization
  - Convergence and Digitalization
  - Wireless Communication and Mobility
  - Next Generation Broadband Technologies
  - Personalized Media and Personal Mobile Devices
    Transformative Internet Related Media

- Gamut of applications and devices which are constantly changing

- Individualized information and content control

Global Telephone Subscribers and Internet Users (billions)
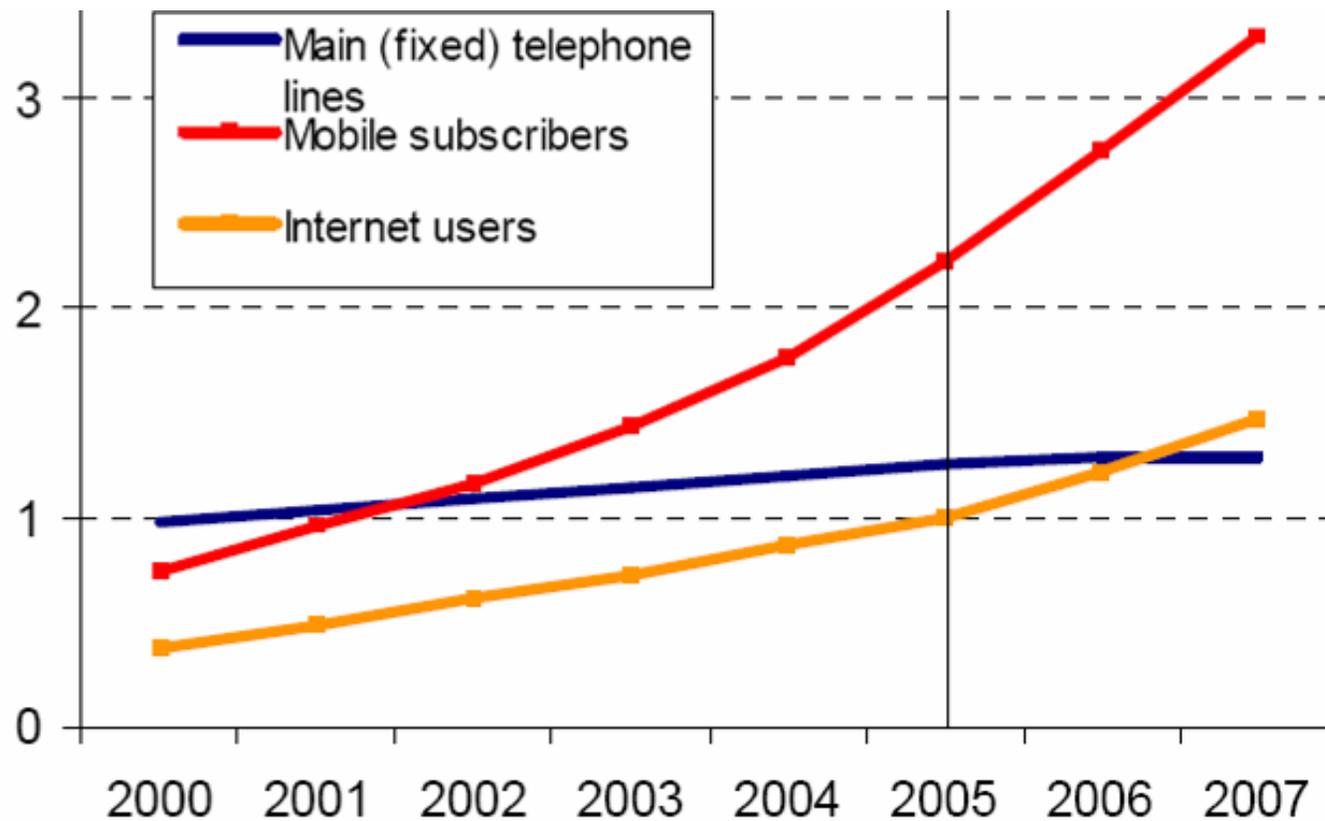
Source: Report on the World Summit on the Information Society Stocktaking, 2008
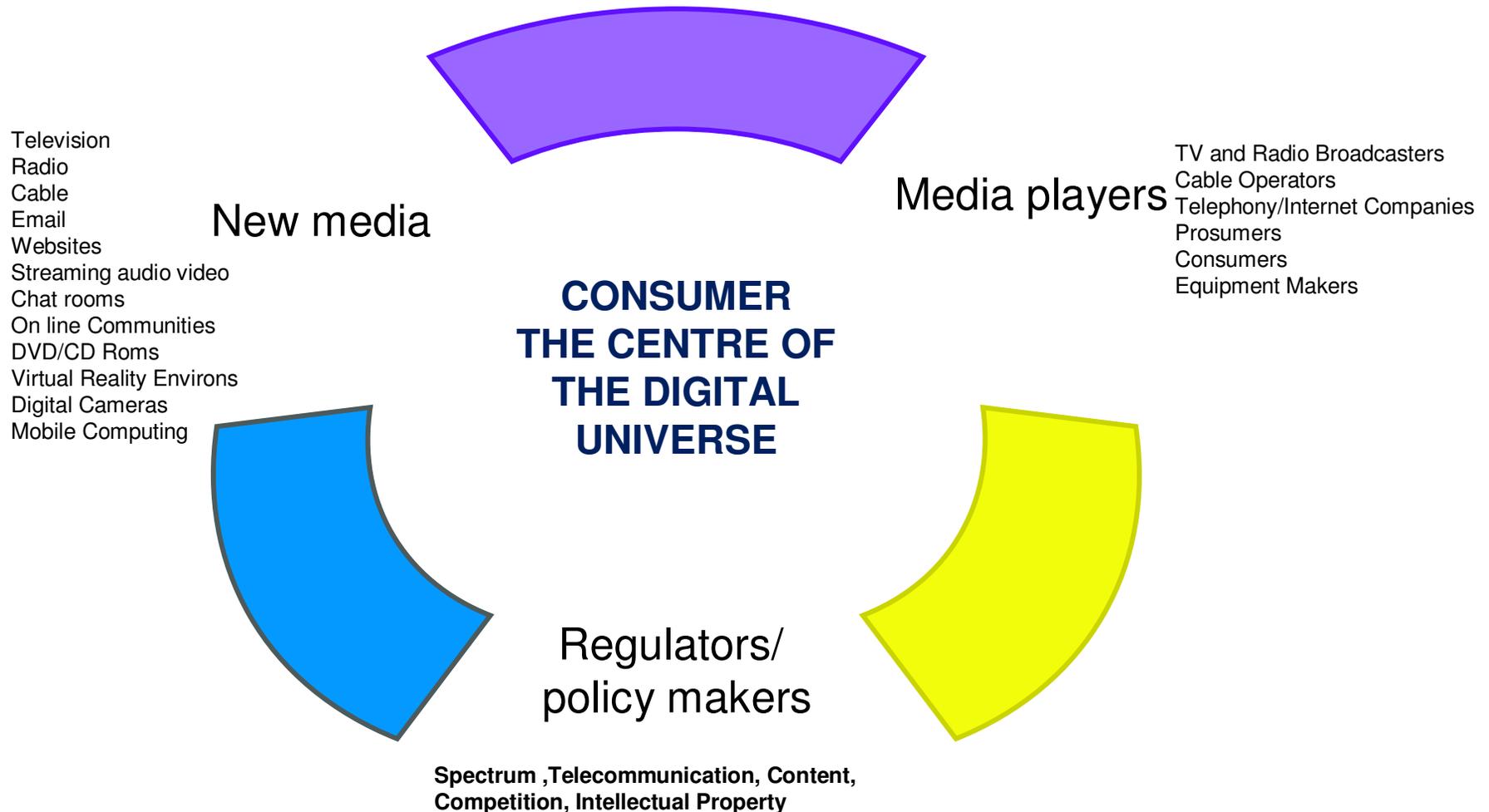
Media Trends

- Internet Traffic is growing spurred by consumer demand.
- Increase in number of mobile internet users
- Replacement of cable by internet video
- New applications, Social networking, Web 2.0.
- Locally, Internet users up, but still low penetration. Low penetration of broadband use. Mobile use pervasive.
- Conglomeration - RJR Group, CVM Group, FLOW

Media Trends – Local

- Rapid expansion in Radio, Television and Cable sectors in the past decade.
  - Increase in the number of radio stations.
  - Increase in TV sets, but decline in potential to TV audience and in FTA viewers.
  - Increased investment in cable sector and increased cable viewership with ½ TV sets having cable installed.
- Telecoms providers entering media market via STV
- Primacy of Content across diverse platforms
- BCJ active in content regulation and media literacy, but more to be done.

Regulatory Issues and Challenges

The transient/cyclical nature of regulation

Television
Radio
Cable
Email
Websites
Streaming audio video
Chat rooms
On line Communities
DVD/CD Roms
Virtual Reality Environs
Digital Cameras
Mobile Computing

New media

Media players

TV and Radio Broadcasters
Cable Operators
Telephony/Internet Companies
Prosumers
Consumers
Equipment Makers

**CONSUMER
THE CENTRE OF
THE DIGITAL
UNIVERSE**

Regulators/
policy makers

**Spectrum ,Telecommunication, Content,
Competition, Intellectual Property**

Emerging Regulatory Issues and Challenges (1)

- **CONVERGENCE** of technology, services, businesses, markets and user perceptions. How do you regulate in the face of convergence?
  - Requires unified policy, new or reformed legislative and regulatory framework
  - Additional Support from Electronic Systems of Regulatory Content Monitoring

- **CONTENT REGULATION** faces the challenge of seeking to promote quality outputs through development of Codes and Standards.
  - Self Regulation should be encouraged.

Emerging Regulatory Issues and Challenges (2)

MEDIA LITERACY: Three challenges for Regulator:

1. Help the population to participate in the new convergent culture
2. Help the media to understand its impact on the population.
3. Help the population to make informed judgements about their choices.

COMPETITION: The Regulator has to seek to promote a level playing field in the face of new ownership structures, issues of content monopolization, intellectual property, digital rights management and others.

DIGITALIZATION AND SPECTRUM REFORM

Some regulatory issues arising out of recent consultations include:

- timing and cost to industry of conversion

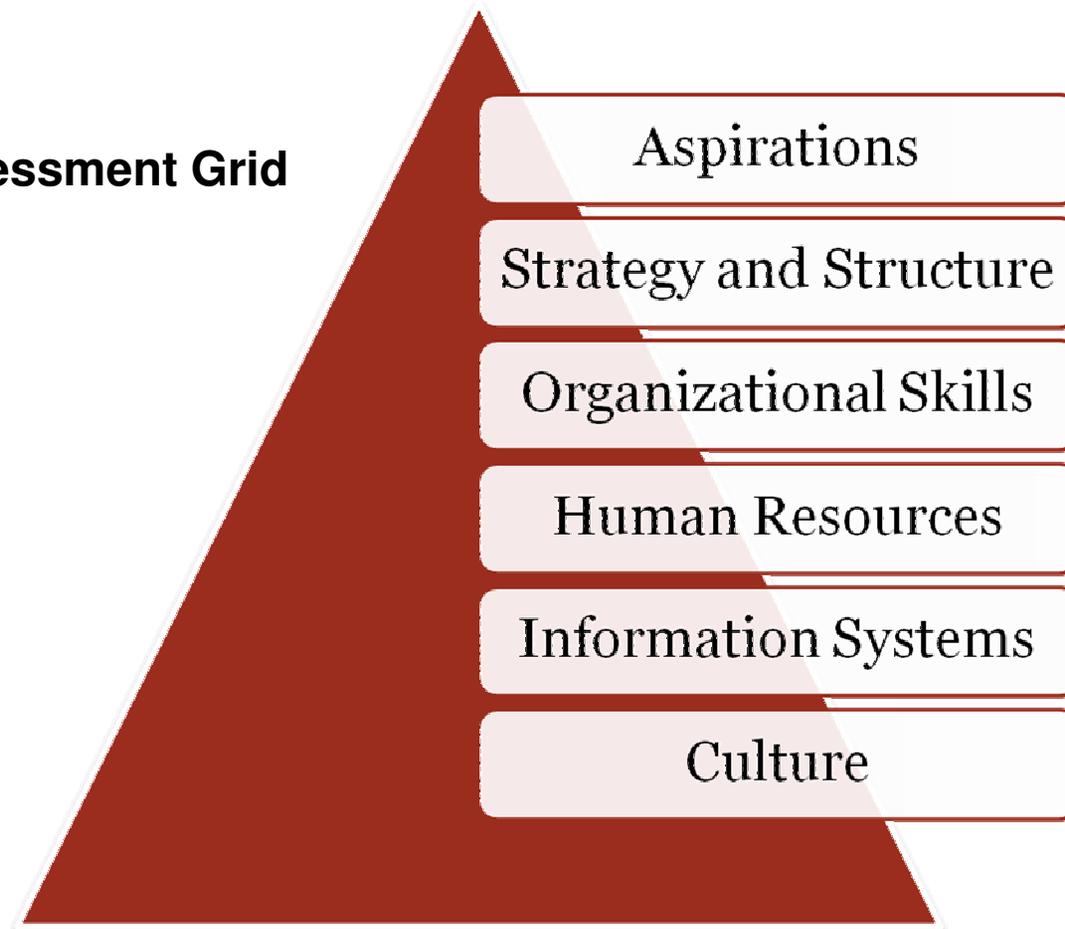- spectrum availability and requirements for spectrum policy reform

PUBLIC AND COMMUNITY BROADCASTING

Challenge to encourage and facilitate entry into the new media era.

Emerging Regulatory Issues and Challenges

Institutional Strengthening

McKinsey Assessment Grid

Aspirations

Strategy and Structure

Organizational Skills

Human Resources

Information Systems

Culture

Possible Policy Approaches

- **INCREMENTALISM –** formulating and implementing policy gradually in stages

- **COMPREHENSIVE RATIONALITY –** Considering all possible options or approaches to solving the problem, a comprehensive policy is formulated

- **MIXED SCANNING –** A comprehensive policy is determined that is executed in stages. Each stage is evaluated before moving on to the next stage.

Strategically Moving Forward

- Creating the ideal regulatory landscape – No one-size-fits-all regulation.

- Coherent, transparent and unified policy, legislative and regulatory framework.

- Effective Content Management is key. Move toward education rather than enforcement.

- New Media Regulation is as much about economics as it is about content.

- Comprehensive Regulatory Reform
  - Diverse and flexible sanctions regime
  - Enhanced Regulatory Autonomy

Strategically Moving Forward

- Media Literacy is necessary to ensure positive outcomes in the new digital era.

- Regional Approach required for issues such as Digitalization and Spectrum Reform

- Benchmarking Best Practices –Strategic Planning and Industry Visits to establish best regulatory practices.

Concluding Comments (1)

- Old media will not disappear. We will have to regulate them for the immediate and foreseeable future

- As we look towards Digital Switchover, we should also contemplate internal regulatory reform and a 'switchover' from legacy practices and systems including:
  - Renewal of technical resources and systems
  - Reform of management tools and monitoring processes

Concluding Comments (2)

- Further consideration for internal regulatory reform:
  - Regulatory convergence and joined-up ministerial policy-making processes
  - Re-engineering of personnel requirements and business processes
  - Building global linkages to centres of excellence and best practices
  - Streamlining and harmonizing of regional regulatory strategies to deal with the emerging and new media

"Today we are beginning to notice that the **new media** are not just mechanical gimmicks for creating worlds of illusion, but new languages with new and unique powers of expression."

- Marshall McLuhan

▫ How will the regulator and policy making apparatus renew themselves to cope with a changing global electronic media environment while leading that wider change and maintaining our present vigilance?

Thank You