Responding to media convergence: Regulating multi-screen television services in Thailand

Trisha T.C. Lin [a],*, Chanansara Oranop [b]

[a] Wee Kim Wee School of Communication and Information, Nanyang Technological University, Singapore
[b] Thai Media Policy Center, Chulalongkorn University, Thailand

ABSTRACT

This study examines how Thailand's convergence regulator, the National Broadcasting and Telecommunications Commission (NBTC), regulates digital television's transition and new audiovisual services. In addition to document analysis, this study interviewed stakeholders (e.g. NBTC policymakers, broadcaster and cable TV operators). The socio-technical analyses show that the NBTC prioritized digital television transition and imposed substantive government/policy support. Comparatively, Internet Protocol television (IPTV) and mobile TV which are driven by the industry/market subsystem have sluggish regulatory advancements. The interview results show that the NBTC is likely to regulate multi-screen TV services' contents and platforms separately as a result of complexity. Hence, this study recommends a platform-neutral approach to regulate audiovisual media categorized by socio-cultural impact and content production/aggregation model. It suggests that Thailand's TV-like services which can reach a mass market and produce/aggregate contents/services via a gatekeeping mechanism should be subject to strict content regulations and licensing schemes. However, light-touch regulations in content and licensing are suitable for governing emerging TV-like services which utilize a participatory content model with less socio-cultural impact. Finally, net neutrality is recommended in facilitating cross-platform content innovations and distribution.

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1. Introduction

Due to rapid technological advancements, television has transformed into various innovative and individualized audiovisual services including Internet Protocol television (IPTV), mobile TV, over-the-top TV, etc. As a result of improved viewing experiences and wireless connectivity, smartphones and tablets have become popular screens for people to watch videos on the move. In 2009, the emergence of three-screen TV developed integrated solutions for video viewing (Krazit, 2009; Noam, 2008). Later, multi-screen TV services which allow users to consume videos on various screens (i.e., smartphones, games consoles, tablets, PCs, and TVs) introduced new ways to distribute, consume, share, and create content in countries with advanced information and communications technology (ICT) (Simon, 2011). On the one hand, cross-platform video consumption leads to continued significance of TV media nowadays. According to

Ericsson Consumer Lab report (2014), TV remains the most used screen media for video consumption, yet its importance decreases due to prevalent use of portable devices. Avid multi-screen TV users are typically young adults (Pew Research Centre, 2012). On the other hand, multi-screen TV has brought complex convergence issues and regulatory challenges in existing socio-technical systems of traditional TV industries (Lin, 2011). In response to rapid audiovisual media convergence, different countries develop different regulations to foster innovations and economic growth and protect socio-cultural values like cultural diversity and minority.

In Thailand, TV is most important media, accounting for 60% of advertising revenues, based on 2012 Nielsen media research (Yoonaidharma, 2012). However, it is the last ASEAN country to introduce digital TV (DTV). In December 2010, after its Parliament passed the Organization to Assign Radio Frequency and to Regulate Broadcasting and Telecommunication Services Act (henceforth, the NBTC Act), the long-term monopoly over Thailand's telecommunication and broadcasting industries came to an end (Thaveechaiyagarn, 2012). Its first independent convergence regulator, the National Broadcasting and Telecommunications Commission (NBTC), was formed in late 2011, which aims to take concrete actions and make significant changes to ensure the growth of the two industries. The NBTC's DTV master plan (2012–2016) widened business opportunities for broadcasters, content providers, telcos, device manufacturers, and advertising agencies (Leesa-nguansuk, 2012). After completing the spectrum auction of commercial DTV, a 10-year migration plan from analog to digital TV started in January 2015 with a goal of 80% population adoption by 2020 (Tortermvasana, 2012). Triple-play networks have grown steadily to provide IPTV services for Thai audiences despite the low broadband penetration (IPTV News, 2012). The widespread use of mobile phones in Thailand presents business opportunities for mobile TV services. These show that Thailand has great potential for multi-screen TV development.

The multi-directional trajectory of emerging multi-screen TV is shaped by various actors in the socio-technical subsystems. Thailand's TV industry, its most popular form of mass media, has long been controlled by the government for propaganda purposes. After the NBTC Act, how did advancing digital multi-screen technologies and changing media consumption styles reform audiovisual media environment and shape the convergence regulations in Thailand? Taking a socio-technical approach, this study examines the regulatory development of digital audiovisual media after the NBTC Act, and investigates how key stakeholders in the policy/government and industry/market subsystems shape the trajectory of emerging multi-screen television services. This study not only conducted document analysis of abundant second-hand data such as NBTC reports, policies/regulations documents, media market analyses, and news articles, but also interviewed key stakeholders involved in convergence including policymakers and regulators (e.g., NBTC's vice chairman and committee of digital switchover), and broadcasters and cable TV operators (e.g., top management in MCOT and True Corporation Public Company) in June 2012, March 2013, and December 2014. This study used the socio-technical framework to analyze data and applied a platform-neutral multi-screen TV regulatory scheme (Lin, 2013) to make recommendations for Thailand's case. The findings contribute to the latest understanding of Thailand's convergence and regulatory challenges in emerging multi-screen television services and make platform-neutrality recommendations to regulate content and licensing differently on four types of audiovisual media.

2. Multi-screen television convergence issues

The rapid adoption of smartphones and tablets as second screens has transformed traditional television viewing (Tribbey, 2014). In recent years, connected TV allows users to access Internet content such as web videos. Although many smart TVs are not comparable to smartphones in terms of usability, new TV devices and services such as Apple TV and Google TV bring Internet content and services to the living room and challenge conventional passive TV services directly. With the availability of new devices, the consumption of audiovisual content across platforms is growing rapidly, which shapes conventional TV businesses drastically and turns consumers' viewing behaviors towards time-shifted and over-the-top services (Nielsen, 2014). Consumers select live and time-shifted audiovisual services and create personalized viewing schedules to fit their flexible digital lifestyle. It is crucial for industry players to address the evolving consumer expectations with multi-screen TV services.

Regardless of platforms, TV is ultimately content-driven. Traditional TV channels, on-demand videos, and a huge amount of user-generated content give consumers a variety of viewing options and personalized experiences. As video delivery modes increase, audiovisual content producers (e.g., broadcasters, cable TV, and IPTV) have diverse ways to redistribute their programming to maximize long-tail revenues with increasing concerns over digital copyright protection. To engage audiences, TV operators harness social media to create a backchannel which facilitates social expression and co-viewing experiences (Shepatin, 2012).

One key technological issue in multi-screen TV industry is providing integration solutions with system interoperability capabilities so that audiences can watch varieties of videos via different screens seamlessly. Also, it is essential to develop platform independent devices for different systems and networks (O'Neill, 2009). The 2012 Future of TV Survey reported that over half of the TV operators regarded cloud computing as a crucial technology in TV innovations (Informa, 2012). Creating ubiquitous audiovisual contents over the cloud which can be distributed and accessed swiftly cross platforms is also the key to successful multi-screen TV services (Davidovitz, 2010).