GLOBALISATION AND TELEVISION: COMPARATIVE PERSPECTIVES

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Abstract

This paper examines the major debates about globalisation and television, setting them in an international empirical context. It explores varying conceptualisations of globalisation, examining common themes and significant differences, arguing that often unrecognised complexities lie behind some of the assumptions made about the impact of global television. Globalisation is presented as the most recent ex- pression of a phenomenon having a long history but a much more recent concep- tual origin in the media imperialism thesis. Using examples drawn from such wide- ly varying countries as China, Hong Kong, Singapore, Malaysia, Taiwan, Pakistan and India, the paper examines the role of national governments, and media organ- isations in both exploiting and resisting global television. In doing so it points to the importance of studying media regulation particularly in relation to the public sphere and suggests that a greater understanding of television in contemporary Cyprus can be achieved by utilising aspects of theories of globalisation and drawing on em- pirical examples from elsewhere in the world.

Understanding Change in World Television: A Stimulus and a Challenge

Discussions of globalisation have become a central feature of almost all consid- erations of the future of television. The issues associated with globalisation are prominent in the pages of academic journals, business magazines and in the polit- ical section of newspapers. But such discussions include a wide variety of themes, approaches and interests. In addressing globalisation, scholars are vigorously hav- ing to redefine and integrate a number of previously disparate concepts in order to grapple with a changing field. At the same time, entrepreneurs are operating in that field and forever trying to manipulate it in the hope of making even more money. On the other hand, governments and other policy-makers are coming to terms with processes which, often quite correctly, they perceive as threatening.

The task which all three groups confront is a difficult one; the picture of change in world television becoming ever more hectic. Television is, for most of the world, a relatively recent cultural introduction and has grown rapidly in new markets, of- fering new challenges to governments and other existing cultural institutions and presenting a range of sometimes unfamiliar images to viewers; all of this at a time when many of the societies into which it has come have themselves anyway been undergoing radical changes associated with post-colonial nation-building, urbanisa- tion, and industrialisation, among many other things.

The enormous change associated with this has been in the perception of the fu- ture of television. With the widespread and fast-growing introduction of cable and satellite delivery, television now shares its distribution technology with the whole field of telecommunications, and thereby with the explosion of interest in the op- portunities offered by information technology. This interest is not new. To quote the then Singapore Minister of Information and the Arts (Yeo, 1994, p. 104):

> A technological revolution is sweeping the world. No aspect of life is left un- touched. All societies are affected and some are shaken to the core. The revolu- tion in communication, information technology and transportation has weakened the power of governments and integrated the world economy in a way never seen be- fore. It broke up the Soviet Empire and forced open countries like China and Viet- nam. All borders are now porous. National wealth is increasingly based more up- on knowledge than on land and natural resources.

This echoed the widely known views of the American Vice-President, Al Gore (Gore, 1994, p. 22), in support of:

> … the creation of a network of networks, transmitting messages and images at the speed of light across every continent, is essential to sustainable development for the human family. It will bring economic progress, strong democracies, better en- vironmental management, improved healthcare and a greater sense of shared stewardship of our small planet.

There is of course a good deal of argument about the accuracy of these views (see for example Golding, 1994, especially pp. 469-77). Gore, in particular, is open to the charge of utopianism. But they remain as very clear indicators of the extent to which debate about television is having to open its frontiers to encompass a far wider range of applications and usages.

Globalisation: Some Definitions

The idea of globalisation is, then, not substantially new. Indeed very early ex- pressions of globalisation are very evident, for example in the Eastern Mediter- ranean, the Roman Empire, the exploits of Alexander and, of course in certain

phases of the spread of Christianity. Several factors have, however, stimulated an interest in contemporary globalisation and these include a return to some of the founding ideas in discussions about globalisation. Robertson (1992) for example, points out that the spread of the nation-state as a mode of political organisation is itself a product of globalisation and that declarations of- cultural identity on the part of national or other groupings are themselves often a response to globalisation.

Golding (1994b) provides a convenient summary, listing four key aspects of contemporary globalisation. First is the decline of the nation as both a cultural force, where people begin to identify more with supra national cultural affiliations than with those of the nation, as well as the reduction of the role of the nation state as a political and economic force. Secondly, new levels of organisation both above, at the supra national level, and below at the regional level, supposedly take over the functions previously performed by national governments. Third, is what Golding calls the syndicalisation of experience, that is the emergence of major cultural and commercial symbols in the form, most obviously, of internationally traded branded goods. And finally, he points to the role of the major international languages, par- ticularly English, as the vehicle for international culture. Golding's main concern is to highlight the patterns of inequality that these global processes reinforce both within as well as between societies.

The multi-faceted concept of globalisation has a number of strands and emphases to which other writers have drawn attention. Sometimes globalisation is depicted as the march of technologies, institutions, processes and forces which inexorably extend their reach and incorporate the world into a single global market. In academic discourse, globalisation usually includes a discussion of the accelerating compression of the world along a time space dimension (Mohammadi, 1997; Robertson, 1992; Waters, 1995). This is sometimes linked to a cultural globalisation where the conglomeration of major media enterprises are emphasised (Herman and McChesney, 1997) and where the development of global television news and the increased consumption of world wide cultural icons, imagery and styles are seen to bring subordinate cultures into closer contact with dominant ones (Corco- ran, 1998). A further line of argument is that the key to understanding media and communication in the global context lies in the ways in which the communication of information is seen as being transformed into a global cultural ideology of consumerism (Sklair, 1993).

Whilst some commentators see patterns of domination as deeply entrenched (Hamelink, 1983; Schiller, 1992) others see it as a temporary state which will give way to increasingly balanced patterns of distribution as the cultural industries throughout the world increase their capacity to produce products which better meet the needs of local audiences.

The end of the twentieth century has witnessed unprecedented changes in world political and economic structures, and these, together with major technological innovations in communications, are often seen to be central to an understanding of globalisation as an expression of an advanced market economy which has had a significant impact of communication structures and policies in many countries. Frequently this has resulted in the liberalisation and deregulation of media. As Hamelink notes, 'many countries around the world are revising their communication structure. In this process the leading strategy would seem to be "more market, less state" and the buzz words have become privatisation and liberalisation' (1997, p. 96).

So, the concept of globalisation has been used to both identify and explain sweeping social, cultural, institutional and technical changes. As long ago as 1992 Ferguson alerted us to the dangers of over simplification in this project, and although now nearly a decade old, her arguments are still pertinent. She refers to globalisation as a myth, not in the sense of it being an untruth, for it is clear that there are global markets in the circulation, and distribution of all kinds of products, not just cultural artefacts, but uses the term as a way of engaging with certain as- sumptions about the role of ideas, images and beliefs, how they are created, and how they are sustained in the modern world. She identifies seven 'myths' about globalisation amongst which are that 'bigger is better', and that 'more is better' and so challenges the alleged beneficial nature of free market economies and privati- sation by suggesting that viewer choice is not increased nor is the quality of pro- gramming necessarily improved by globalisation. The myth of 'time, space com- pression' overstates the power of modern communications technologies forces for public and private good, argues Ferguson, for whilst the increased mobility of infor- mation and people does not make time and space irrelevant, it simply highlights the extent to which these areas of experience have become more inter-related and complex, and suggests, but ignores, the growing inequality between the informa- tion, rich and poor. The emergence of global, cultural homogeneity, the cultural ex- pression of inclusion that promised unity out of diversity is also called into question by Ferguson. Recent evidence from national and local television practices in many countries in Asia certainly points to the importance of local programming, ethnic and cultural differentiation and the use of local language and dialect in influencing audi- ences' programme preferences.

Ferguson's argument reminds us of the need for care in the study of the global- isation of cultural production and consumption. At its most seductive globalisation is a doctrine promoting and justifying an interlocking system of international trade. However it is not clear how far the conception of market economy determinism pro- vides a convincing explanatory framework for the complex processes implicated in the term globalisation. Thompson (1995) emphasises this point. "One can speak

of globalisation ... only when the growing interconnectedness of different regions and locals becomes systematic and reciprocal to some degree and only when the scope of interconnectedness is effectively global" (Thompson, 1995, p. 150).

Globalisation: A Continuing Story

The globalisation debate is not a recent phenomenon but the latest in the expressions of concern about the cultural impact of transnational flows of information and entertainment programmes from the West, usually the United States to the East and the South. It has its antecedents in the controversy about media imperialism where concern was expressed at the growing dominance of Western, largely American, originated media practices and products, which were held to create Western-oriented elites in developing countries, therefore, reinforcing Western modes of practice on an ever increasing global scale.

During the 1970's and 1980's, many viewers in both developed and developing countries found themselves able to receive new television channels including more terrestrial channels and channels provided by cable, whether from near neighbours or via satellite from further afield. This increase in channels together with the number of hours of transmission available usually led to an increase in the proportion of American originated content in television schedules. The terms 'media' and 'cultural' imperialism came to be used for this phenomenon, emphasising the one way flow of products and services. Media imperialism focused upon the so-called 'mass' media, of broadcasting, film and the press; cultural imperialism addressed a wider front. Both were often linked to assertions about the perpetuation of relationships of domination and subordination between nations as surviving the passing of the overt empires of the nineteenth century and the first parts of the twentieth which stresses the cultural dimension of political and economic imperialism. See, for representations of this position, Tunstall (1977), Schiller (1969) (1991), Smith (1980), Appadurai (1990).

The concerns surrounding media and cultural imperialism focus on the damage that can be wrought to emerging nations and nation states by the increased availability of western originated cultural artefacts, which allegedly undermine the cultures, morals and values of these developing countries. This is an expression of concern about the cultural impact of transnational flows of information and entertainment programmes from the West, usually the United States, which was associated with an increase in multi national ownership, the dissemination of a limited range of media genres and content, and a down grading of cultural specificity. The result of all this is claimed to be the undermining and eventual displacement of the indigenous cultures of receiving countries.

The thesis of media and cultural imperialism suggests that powerful societies im- pose their values and beliefs on weaker societies in an exploitative manner, in which First World capitalist societies impose their values and beliefs on poorer Third World societies. The concept of media imperialism is tied in with this concern for if there is a dominant western, or particularly US culture, its dissemination is through the mass media which create the conditions for conformity to this dominating cul- ture and limit effective resistance to it. These perspectives can be found in the work of writers such as Hamelink (1983); Mattelart (1983) and Schiller (1992). However, critics have suggested that cultural and media imperialism is often just another term for a high level of practice of professional skills, the value of which is widely ac- cepted by practitioners no matter where they are located; that the processes of im- perialism are not the same in all countries and that national responses are varied and cannot be inferred from global patterns. In any case most countries have their own cultural and media forces which mediate the possible influences of externally produced cultural products (Sklair 1993).

Certainly a limitation of the media imperialism thesis is its assumption that media imperialism equals cultural imperialism and, therefore, that authentic national cul- tures will be swamped. The thesis claims that these cultures are undermined by the dumping of Western culture via slick media products. There are two problems with this argument: first, many programmes are bought cheaply and are old, dated, and relatively unsophisticated. They were made for a different audience at a different time in global history and, therefore, may appear inappropriate and unreal. Second, where there are multiple languages, religions, and ethnic groupings, overlain by so- cial class and social status differences, then the existence of any simple national and cultural identity is difficult to imagine. If it does not exist it cannot be subvert- ed. In any case the different elements in multi-valent societies respond differently to outside media influences, whose products can be 'read' against the prevailing lo- cal culture and identity. Culture is a multi-layered phenomenon; the product of lo- cal, tribal, regional, or national dimensions, which is anything but a single interna- tional culture.

Furthermore, the media imperialism thesis often fails to recognise that there are strong regional exporters of television programmes other than the United States. For example, Mexico and Argentina have a tradition of exporting media to near neighbours and to hispanic Europe, while Indian films and records go to many coun- tries in Africa and Asia. However, countries which are strong regional exporters of media tend themselves to be heavy importers of American media (Tunstall, 1977). This suggests that whilst rejecting some of the tenets of a simple media imperialism thesis, it would be wise also to recognise that there are open and less open mar- kets. The door which is opened to allow exports out also allows imports to pass through it.

Finally, as Hartmann and his colleagues in their intriguing study of the impact of the mass media on village life in India and the implications for development have pointed out, assumptions about the influence of media on day-to-day life often ignore social structure and structural conflict, treating audiences as an amorphous mass. In addition, there is a tendency in the received wisdom about development and the mass media to regard consumers as essentially passive. This leads to earlier assumptions about how media effects work and, therefore, misleadingly privilege research paradigms and methodologies that operate within an effects or effectiveness framework. As these authors, and many others have noted, 'in most respects mass communications are far less important sources of information and influence than interpersonal communication' (Hartmann et al., 1989, p. 259).

Globalisation in Asia: Practice and Policy

Among the mass media it is television that has changed most drastically, assisted by technological advances in cable and satellite broadcasting. Whilst these changes towards liberalisation and de-regularisation first started in Western Europe, this aspect of globalisation has, nevertheless, been affecting Asia since the 1980's (see French, D. and Richards, M. 1996, 2000). Whilst it is all too easy to generalise over such a vast area and such widely ranging countries, it is possible to characterise the Asia of the 1990's as having experienced economic growth, and as tending to adopt more 'liberal' (i.e. free market) economic strategies. In these processes the mass media and telecommunications, particularly broadcast media, are important agents for change and many Asian countries have undergone significant changes in media policies, structures and operations (Hong and Hsu, 1999). The growing commercialisation of Asian broadcast media has generally resulted in a swift growth in advertising, a significant if sometimes short term increase of foreign programmes, and an expansion in the number of channels. In some cases these changes have also featured the weakening of the ability of states to adopt ideological moral positions in the face of economic pressure from the markets (Karthigesu, 1994).

There is no denying the fact that the broadcasting environment in Asia is vastly different from what was two decades ago. But the unmistakable imprint of histori- cal choices is clearly visible even today. These choices continue to dictate broadcasting cultures in Asia. Some like Hong Kong and Japan were quick to see the logic and potential of a mixed system based on substantial autonomy for commer- cial television. Today, these enterprises function as giant cultural industries with significant interests in overseas markets. But variants of public-sector undertakings (often notably lacking in their commitment to practices recognisable as 'public service') remain a main force within broadcasting in Asia, in spite of the inroads made by commercial broadcasting over the last decade.

Satellite broadcasting, particularly the operations of the Hong-Kong-based STAR TV network which started in the late 1980s, indirectly contributed to a changed broadcasting environment in Asia. It facilitated encounters with global culture and governments in many of the South-East Asian countries and saw these new developments as potentially subversive and a threat to their control over the flow of opinion. Some, such as China, Singapore and Malaysia (see Nain, 1996, p. 176 and Hukill, 1996, pp. 133-134) clamped down on the ownership of satellite dishes, with varying success. Much of the anxiety expressed by state governments in South- East Asia stems from the widely-subscribed to but ultimately technologically-deter- minist notion that television, or for that matter new information technologies, have an in-built potential to subvert and/or 'democratise' society against ruling interests. The rather simplistic equation between CNN and democracy has become part of popular imagination since the events in Tianammen Square (see Lo, 1996). Gov- ernments in Asia, nevertheless, continue to fear both the real and imagined conse- quences of media outside their influence and control.

This reversal of priorities is in essence, the new vision of state broadcasting in Asia. Throughout the region, the lofty ideals which accompanied the establishment of television - couched in the often weary state discourses on development, edu- cation and cultural pluralism seem to have vanished in the haze of liberalisation, pri- vatisation, deregulation and the economics of choice. Today competition is the buzz word and monolithic state-run television structures from Indonesia to India are frantically trying to redeem their sagging image through improving the quality of their productions, encouraging professionalism, opening up to private capital, cre- ating opportunities for joint productions with the private sector and actively pursuing overseas markets. It might be expected that the more obviously commercially-dri- ven television systems in Malaysia, Singapore and Hong Kong would emphasise competition but, as Wei (2000) shows very clearly, even in China, the political im- peratives of government policy are having to be reconciled to the need for market viability.

Broadcasting in Asia is undergoing substantial changes to its structures, its philosophies and its methods of operation. Key among these challenges is a strat- egy to handle the realities posed by convergence - with markets, industries and technologies and in terms of production, ownership, applications and, in particular, regulation. Asian broadcasting systems are actively being digitalised and have for many years used computing and satellite technologies in the context of production and transmission. In the UK and elsewhere in Europe there are moves to merge hitherto separate regulatory bodies in recognition of new, convergent, delivery sys- tems. But, in Asia, it would seem in general that the trend is in the opposite direc- tion, towards the preservation of the status quo. There seem to be two conflicting objectives: first, to actively support convergence in the high-end IT and telecom-

munications markets towards the maximum exploitation of its business potential; on the other hand, to restrict their presence in broadcasting, experimenting with convergence technologies in broadcasting only as long as this would lead to reinforcement of the role played by the state as the key arbiter of matters related to nation- al sovereignty and cultural autonomy.

This separation between telecommunication and broadcasting is bound to be a stop-gap measure. As the case of Internet-radio in India shows, the provision of on-line services by national and commercial broadcasters in Asia and collaboration between broadcasters and telecom and internet firms in the establishment of websites, point to the fact that convergence has a momentum of its own that is impossible to bypass and that is not restricted by political imperatives. Hukill's (1998, p. 11) comment on the options for television in Singapore in the context of two competitors, the Singapore Broadcasting Authority and Singapore Cable Television and one potential competitor, Singapore Telecom, highlights the fact that convergence, in all its manifestations, will eventually have to be reckoned with, sooner than later - "The government's strategy is to continue to strengthen the position of national broadcasters, as changes in technology, increasing audience demands, and competitive forces come to the fore, by developing systems which will continue to provide the largest audience share to government-controlled sources in the wake of changing technologies which may eventually by-pass such systems".

Asia has undoubtedly experienced a period of media liberalisation and deregulation where broadcasting has been given more freedom, even encouragement to become sensitive to, and often dependant on, market responses for revenue. Asian television operators have progressively been unable to rely on the financial support of government subsidies and licence fees and have seen their revenue increasingly made up of advertising revenue and subscription charges. In some cases this has meant that traditional concerns with political and social stability, cultural integri- ty and even national security have begun to take second place to market competi- tion. National governments in Asia have welcomed, and sometimes cynically ex- ploited, the global trend of media commercialisation whilst retaining a certain amount of concern about the impact on national cultures and their remaining pow- er of control of the media. Again, the chapters here concerning Singapore and Malaysia demonstrate this trend most explicitly. But the need to improve the com- petitiveness of domestic media industries has brought benefits, particularly in terms of providing programming in a variety of languages and in responding to local needs and issues. Hong and Hsu {1999) suggest globalisation has led to adjustments in Asian media policies which have stimulated new industries and therefore new em- ployment in media and software have been created; at the level of programming context, pluralism, diversity and choice have been enhanced; and audience access has been expanded.

Cultural Globalisation and Local Responses

Given this diversity of media environments and the many country specific link-ages between the State, the private-sector and broadcasting, it would be unwise to suggest that there are uniform changes affecting broadcasting in Asia today. In-stead we are seeing many instances in Asia of countries responding to the chal-lenges posed by cultural globalisation in very country-specific ways. For instance in India, satellite-channels such as MTV and Star's Channel V, while couched in the playful language of post-modern television nevertheless attempt to re-locate rather than dislocate aspects of Indian popular music culture. The dominance of local-lan-guage programming in most of North-East Asia and the remarkable success of the highly uniquely home-grown cartoon-strips and 'Manga' comics in Japan are further illustrations of the real presence and influence of the local. In most countries in the region, local productions continue to provide the bulk of programming.

Such local developments are not products of a deliberate strategy of cultural pro-tection mounted against the threat of foreign values. They merely point to the fact that the encounter between globalisation and localisation by no means results in a guaranteed swamping of local cultures. It is often the case that global cultures of consumption are opportunistically exploited by the local. Sometimes this leads to the subversion of the established order, for example, pirate cable TV in Taiwan func- tions with little or no regard for infringements of international copyright regulations [Richards (2000) and Kumar (2000)]. Most often, localisation ensures that local cultural needs are catered for in very culture specific ways. Examples of local in-genuity include the many local serials in Asia, for example, the culturally-specific version of Sesame Street produced by Shanghai Television and scheduled to go on air in February 1998 and from the world of telecommunications , the remarkable suc-cess of Muhammed Yunus (of Grameen Bank fame) in setting up Grameen Tele-com, a cellular service serving thousands of Bangladeshi villages. The profusion of local language satellite channels in India is another example of localisation at work [Thussu (2000), Kumar (2000)], as is the increasing local content being produced in Pakistan (Tahir, 2000) and the channels devoted to ethnic minorities in Taiwan. But, as is shown by Chang (2000), the financial viability of this last local response is somewhat insecure, a recurrent problem in the tactic of building niche-markets as a response to global products.

Evidence in favour of localisation does not however take away from the fact that the impetus and the desire to create uniform cultural trends are global i.n design. Rather it points to the need to be wary when making generalisations about the uni-formity of cultural change since change is prone to a variety of cultural inflections. In a sense, manifestations of localisation reflect the many paths of economic glob-alisation. The purveyors of global capital are not unduly constrained by local cul-

tures of consumption so long as these generate profits. Cultural inflections do not necessarily become a source of primary identities, nor do they become a basis for a resolutely different ethic of production and distribution. Rather, local media tend to recombine and commodity identities in line with the profit motive of global culture. There may be the occasional serial like the Ramayana in India which touched an inner chord in the audience and lead to their identification with larger realities, but such products are relatively uncommon. Soaps and sit-corns lead to further soaps and sit-corns. That is in the nature of the business. In other words, and despite its distinct unfashionableness in media circles, there is still some value in the concept of media imperialism, precisely because of the dissemination of standard, global grammars of production and standardised technologies of transmission and reception. On the other hand, Lee (2000) shows how even television which has developed within highly globalised genres in Hong Kong, has played a key role in developing a very specific national identity. (For a more detailed discussion of national identity see the paper by Richards in this collection.)

What is strikingly evident in Asia is the fact that this new climate of broadcasting is the child of global capital, nurtured primarily by the captains of industry and the politically powerful. It would seem that those who have benefited primarily from this changed environment are assorted conglomerates, global and national, who already enjoy economies of scale by virtue of their economic interests, and enjoy the confidence of the ruling elite.

It would, of course be an exaggeration to suggest that the media market in Asia has been carved up in its entirety by these types of interests and institutions. There have been a number of secondary beneficiaries including low-investment cable-TV operators, small producers and medium sized companies who have plugged into the market for indigenous software. This is a lucrative industry given the perennial problems on the supply side. There is just not enough software to fill airtime on the satellite channels. Distributors and a variety of agencies servicing the needs of the cultural industries have also benefited from this changed environment.

Independent producers are however faced with a culture of production that demands more of the same - sitcoms, chat shows, quizzes, celebrity hours, game shows, etc., that have become the metaphor for 'choice', 'good TV' and prime-time TV. Such tried and tested productions are the commodities which substantially define contemporary television. The role of advertising is important here.

Unconfirmed understandings of product marketing and impact are a vital part of the mythology of the global advertising industry. Rothenburg (1998, p. 74), alludes to what he terms the 'Knowability Paradox' in advertising, "The less we have known about how advertising and the media work, the more advertising and media there

have been. Conversely, the more advertising and media there have been, the more they have shaped the culture that they saturate. Sitcoms, 'docu-dramas', 'advertorials', celebrity covers, radio, shock jocks, drive time - the forms and conventions that are as familiar and invisible to us as the air we breathe owe their existence to the fact that we don't know what works to attract consumers, or why. Hence the continual hammer of innovation against the hard shell of tradition". Whether we agree with this observation or not, it does, however, point to the fact that media entrepreneurs have a lot to gain by nurturing this mythology of 'consumer' choice, good television and narrowly circumscribed, prime-time genres.

But there are other forces for change. The profusion of alternative media organisations in Asia committed to other models of broadcasting have the potential to make a difference. The availability of low-cost transmission technologies has enabled clandestine, ethnic and 'minority' broadcasting for groups who have been denied audiovisual space by 'majoritarian' governments. Along the borders of Myanmar, among the Mon, Shan and Karen refugee camps, the Internet is fast becoming a means to reclaim a people's right to communicate. The technologies of television production are becoming cheaper and easier to use and therefore more accessible to new interest-groups. Combined with the continuing revolution in distribution, of which the Internet is only a part, the potential for new localised services for previously marginalised groups becomes an intriguing prospect.

Globalisation and the Public Sphere

These issues are closely related to the inter-linked issues of the public regulation of the media and the concept of the 'public sphere'. The latter is defined by Habermas as 'the realm of our social life ... in which citizens confer about ... matters of general interest (quoted in Hallin, 1994, p. 2). The concept of the public sphere is one about which there is a good deal of controversy, with the frequent charge that its tenor is idealistic and utopian, bearing only a limited resemblance to the realities of media organisation around the world. To quote Hallin (1994, p. 3): 'For Habermas ... the public sphere is a realm that stands between the state, on the one hand, and the realm of private interests on the other, and it needs to be kept autonomous of both.' The public sphere is something which is in principle open to those who wish to express their views on matters of public importance and for those who wish to have access to such views.

This is not the place to engage in any lengthy attempt to summarise even the main positions in the debate, but it is clear that the concept provides a useful model to apply to the role of the media in those societies which aspire to a pluralist, participatory mode of political culture. For us the key question is: in what way does the process of increasing internationalisation in television affect those issues which

arise in discussions of the public sphere and how does this relate to the future of the existing regulatory regimes and of those which may come later?

At the national level we have already noted that theorists of globalisation stress, as a starting point, the threat to the nation-state. Insofar as this familiar thesis is correct, there is little reason to see the system of the media, and of television in particular, as in any way immune from this aspect of the process. National governments have, of course, always been particularly concerned with the 'safe' operation of the media, and indeed have been primarily responsible for the difficult task of defining the nature of the regulatory regime. Arrangements for the supervision of the media are always sensitive, whichever mode they operate in. The sensitivity concerning the definition of appropriate modes of regulation arises partly because of the evident subjectivity of the judgements to be made. At its simplest, the views of the regulators are unlikely to be accepted by those with different political or cul- tural viewpoints. It also partly derives from the very strongly competing issues of the principles that continually recur in this field: public safety and the protection of minors are forever in conflict with freedom of speech. Another frequently encoun- tered tension is between the need for some measure of creative autonomy on the part of programme makers trying to produce successful, audience-pleasing output and the concern of regulators to be certain about the details of the programmes be- ing passed as suitable for transmission.

Conclusions: and so to Cyprus...

At the beginning of the twenty first century, there is little doubt about the domi- nant rhetoric of television: it is that of supply and demand, the language of the free market. It would be consistent with this to expect the future of the television mar- ket in Cyprus to be a product of emergent mass market consumerism and popular television substantially supplied by non Cypriot media industries. But Cyprus, along with so many countries, is, fortunately more complex than this.

The evidence in this paper and elsewhere in this collection suggests that audi- ences everywhere are no more 'massified' as a result of the 'onslaught' on globali- sation than they were before. There is still, even a greater, demand for local con- tent, reflecting local culture and expressed in local languages. Whatever the forces of global developments in television there are always important pressures from within that provide an important counter-force in the developing market-place. The remaining papers in this collection provide detailed analysis of some of the most significant of these both in Cyprus and elsewhere.

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