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## WALT DISNEY GOES EAST...

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Walt Disney Company was founded in 1923 and today, together with the subsidiaries, it is a diversified worldwide entertainment company with operations in the following business segments: (1) Media Networks, (2) Parks and Resorts, (3) Studio Entertainment, (4) Consumer Products. Walt Disney also includes the corporate divisions (5) Steamboat Ventures and Walt Disney.

To improve productivity and enhance growth, Walt Disney Company continually works to rationalize the supply chain via strategic sourcing and procurement, and to reduce redundancies by increased use of shared services for back office functions. Further, Walt Disney seeks collaborations with new innovative firms operating in areas of broad strategic importance for the Company.

Walt Disney International is at the centre of Disney's business development and growth activities in new and established markets around the world. The group's responsibilities range from providing administrative support and coordination for Disney's 45 global offices to spearheading the Company's planning for international growth and expansion (Walt Disney Annual Report, 2006).

Looking at the revenue figures (Walt Disney Report, 2006) we can say that the Walt Disney Company is successful in its international activities, especially in the Studio Entertainment segment where standardized products (in particular, the idea, the content) can be distributed globally. Within the Media Networks segment, international broadcasting opera-

tions take place locally, and, being tailored to the environment, they resemble a transnational strategy. The company is also investing in foreign television broadcasting, production and distribution in order to enhance its expansion. This strategy reveals the company's awareness of the local imperative when the product cannot be standardized or clashes against cultural diversities. When Walt Disney Company does not pay attention to diversities in the international market its results are negatively affected, as the case of Euro-Disney shows. The typically American park resort clashed with the strong French national culture, and together with the poor weather conditions of the location, contributed to Euro-Disney's failure.

Until now Walt Disney Company has invested primarily in the United States, South America and Europe. However, in the past few years the Company has targeted the markets of Japan and China for investment.

Bob Iger, Disney Chief Executive since 2005, has a new vision for Disney: to become a branded creative content company able to offer relevant and locally produced content. Iger, in particular, considers the Chinese market to be key: under his leadership, Disney has expanded its TV, online and film business in China in the last two years. But, the presence of the Company in the Chinese media market is not so recent. Since 1994 the Disney Publishing Worldwide (DPW), the children's publishing arm of Walt Disney's consumer products division,

launched Mickey Mouse magazine in 1994.

In 2007 the first Chinese Walt Disney film, *The Secret of the Magic Gourd*, was released. It was a co-production with the Hong Kong animation studio firm Centro and the China Film Group. This live-action movie is based on a classic Chinese children's novel, written by a famous author of children's literature, Zhang Tian Yi.

For example, in 2005 Walt Disney Company also opened a version of its Magic Kingdom in China, the Hong Kong Disneyland (Penny's Bay, Lantau Island), which is a joint venture between the Hong Kong government and The Walt Disney Co. The park has come under fire because its attendance numbers are not meeting forecasts. It drew 5.2 million visitors in its first year of operation - 400,000 short of its target - and only more than 4 million in its second year (around -30%).

To boost its appeal to Chinese tourists, Disney's proactive strategy is to go local. The Company is shifting from the position 'the consumer is expected to understand us', making an effort to more deeply understand the China market and to work as the 'Chinese' Walt Disney Company. A first step was to declare 2008 'the year of the Mouse', as 2008 is the year of the rat in the Chinese Calendar<sup>1</sup>.

To kick off the Lunar New Year campaign, Disney's two iconic characters strutted their stuff down a red carpet - Mickey in a

bright red Mao suit<sup>2</sup> and Minnie in a cherry blossom red dress with a bouquet-like bottom created by designer Vivienne Tam, a Chinese fashion designer.

What's more, the Lunar New Year campaign features a logo which merges Disney image with a bit of Chinese culture: the Chinese character for luck (福) flipped upside-down, with mouse ears added on top.



Another important component of the Company's strategy to capture the Chinese population is its online presence Disney.com.cn. Launched in August 2001, the site contains the latest information and entertainment from Disney Mobile (the mobile content provider of the Group was launched in Hong Kong in 2001 and offers a variety of mobile content for major wireless services), movies, home entertainment, publishing, music, consumer products, Disney On Ice (in China since 2005) and theme parks.

Since 2000 Disney's business in China has grown tenfold, aided by the introduction of a varied publishing portfolio and the ever-growing popularity of Disney characters, as well as the adaptation and localization of creative content to make it more relevant and suitable for the local market. In the last 12 years, Disney Consumer

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<sup>1</sup> Lunar New Year will be on February 7, 2008.

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<sup>2</sup> *Mao suits* were named after late Chinese leader Mao Zedong, who frequently donned tight-collared outfits instead of Western-style dress shirt and tie.

Products has expanded its retail presence to more than 25 cities, with 1,600 Disney corners throughout China selling Disney-branded merchandise.

In 2003 the Walt Disney Internet Group (WDIG)<sup>3</sup> and SOHU.com<sup>4</sup>, signed an agreement. SOHU.com still provides design, production and hosting services for Disney's Chinese web site. The company also has licensed Disney Mobile Short Messaging Services (SMS) and Multimedia Messaging Services (MMS) content for distribution via Disney.com.cn and the SOHU.com portal. Integrated throughout the SOHU.com site will be Disney content and additional branded content owned by Disney, including promotional content from all its controlled companies: Touchstone Pictures (Walt Disney's film label), Miramax (film production and distribution brand), Hollywood Pictures (movie division for more adult audiences), American Broadcasting Company (ABC, owned by The Walt Disney Company and part of the Disney-ABC Television Group) and Entertainment and Sports Programming Network (ESPN).

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<sup>3</sup> The Walt Disney Internet Group is the division that oversees various websites owned by the Walt Disney Company and its subsidiaries.

<sup>4</sup> Sohu.com is China's leading online media and mobile value-added services company.

## CHINESE PROVINCIAL SATELLITE TV: AN OVERVIEW

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The structure of the Chinese television system closely follows the administrative organization of the government today. Since 2002 the television system in China has been structured into three levels: national, provincial and municipal, and city. There are two national broadcasters: China Central TV (CCTV) and China Education TV (CETV). At the lower levels, we find the TV stations of Chinese provinces and four municipalities – Beijing, Shanghai, Tianjin and Chongqing, and the city TV stations. Following the opening-up policy started in 1978, the state-owned Chinese TV stations have become more and more market-oriented while relying on advertising revenues as their main source of financing.

Since the 1970s China has used the satellite to raise the penetration of TV signals into the remote western regions of the country. But it was only in 1985 that the programs of CCTV 1, the first channel of the national TV broadcaster Central China TV (CCTV), were transmitted for the first time to the whole nation by the satellite. Since then, the signal penetration rate as a whole has notably increased, from less than 65% in 1985 to 96.23% in 2006. Still today, Chinese households receive the satellite TV channels through local cable operators' network.<sup>5</sup>

By the end of 2006, China accounted for a total of 55 satellite channels: 15 channels of CCTV, 3 educational channels of China Education TV (CETV) and 37 provincial

satellite TV channels of the provincial (and municipal) TV stations. The penetration rate of these channels across the country was not equal, though. Both national broadcasters CCTV and CETV showed an average penetration rate of 51.5%, whereas the average penetration rate of all the 37 provincial satellite TV channels was only 27.9%. However, the penetration rate of the provincial satellite TV channels appeared to be higher in their respective administrative areas: in fact, 31 channels reached, on average, about 82% of people.

The provincial satellite channels appeared in the Chinese television system in 1999, when all the first channels of Chinese provincial and municipal TV stations went on satellite and started to broadcast nationwide. Since then, the provincial satellite TV channels have experienced a fast development, according to the Blue Book on China's Radio, Film and Television (2007). For instance, let us examine the cumulative population, which is an indicator of the growth of TV penetration over years.<sup>6</sup> In the period 1999-2006 the provincial satellite TV channels accounted for a cumulative population of 13.02 billion people, with an average growth rate of 11.4% per year. This figure is higher than the 11.68 billion people shown by CCTV and CETV, both accounting for an average growth of 11% of the cumulative population in the same period. The

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<sup>5</sup> Chinese households are allowed to hold satellite reception equipment for private use only if authorized by the State Administration of Radio, Film and Television (SARFT), the regulatory body of broadcasting industry and audiovisuals in China.

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<sup>6</sup> This indicator is calculated by cumulatively summing the number of people who can receive a TV channel on a one-to-one year basis. For example, if from year 1 to year 2 the number of people receiving a TV channel increases from 1 billion to 1.2 billion people, the cumulative penetration at the end of year 2 is 2.2 billion people.

**Tab. 1 – Comparing the share at national level among Chinese TV channels**

Year	National TV channels	Satellite provincial (and municipal) TV channels	Terrestrial provincial TV channels	City TV channels	Other TV channels
2005	35.98	17.02	26.64	13.37	6.99
2006	35.82	18.99	26.27	12.45	6.48

Source: Blue Book on China's Radio, Film and Television (2007)

growth of the provincial satellite channels is different in rural and urban areas, though Data show that the growth of these channels appeared to be more considerable in the rural regions: in only three years, the cumulative population of 3.33 billion in 2003 increased to 5.97 billion people in 2006, accounting for a 80% total growth. Conversely, the growth of the cumulative population of the provincial satellite TV channels in urban areas was only 36%, from 3.77 billion people in 2003 to 5.12 billion in 2006.

The penetration of the provincial satellite TV channels in the rural areas is not equal, however. Their reach appeared to be more significant in the western areas: in 2006 the cumulative population accounted for more than 2.3 billion people, with a 19.2% increase from 2005, whereas it amounted to 2 billion and 1.5 billion people in the central and eastern rural regions, respectively.

The growth of the provincial satellite channels is also clear from the share data. As displayed in Table 1, in 2006 only the provincial satellite channels showed a steady growth, accounting for a share of 18.99% from a 17.02% in 2005, while the other channels (including CCTV, provincial terrestrial channels and city channels) experienced a fall of different magnitude. Programs such as TV serials, variety programs, news, as well as youth targeted programs, mostly contributed to the success of the provincial satellite channels. In particular,

TV serials appeared to be the most successful TV program, accounting for about 50% of the total share registered by the provincial satellite TV stations in 2006.

In the past two years, the three top provincial satellite TV stations were Hunan Satellite TV, Anhui Satellite TV, Beijing Satellite TV and Jiangxi Satellite TV, according to the Blue Book. However, today it is Hunan Satellite TV which is considered the most popular satellite provincial TV station in China and the leader of entertainment programs: for instance, its successful talent show 'Supergirl's Voice' has led many TV stations to produce similar TV programs.

As a whole, the satellite provincial TV stations have brought about more fierce market competition by affecting the structure of the Chinese television system based on administrative boundaries.

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## CHINESE MEDIA AT A GLANCE: NEWS FROM CHINA

China Media Observatory, Lugano.

### CCTV's H-DTV Channel offers free Beijing Olympics Broadcast

China Central TV (CCTV) will provide all cable subscribers with 3,800 hours of free programming on its High Definition (HD) channel during the 2008 Beijing Olympics, according to a source from China TV Media, a CCTV subsidiary.

The China TV Media source said CCTV would cover the cost of the broadcast in a variety of ways. State Administration of Radio, Film and Television (SARFT) will provide CCTV with more than RMB10 million (1 million euro) in the form of subsidies during the Games. There are no ads on the HD channel, but CCTV expects the advertising revenues generated by its other channels to double next year. CCTV also expects to receive more income from ten of its 40 digital pay-TV channels, as subscription rates are growing. The HD channel will return to the current pay-TV format after the Olympics.

*Source: CMM Intelligence – November 2007*

### China releases new plan to support ethnic language publishing

The central government has released a plan to support ethnic language publications through financial subsidies and extra funding. The Publicity Department of the Communist Party of China (CPC), State Ethnic Affairs Commission, Ministry of Finance, and the State Administration of Taxation and the General Administration of Press and Publication (GAPP) released the plan in November 2007. Under the plan, the central government will set up a special fund to finance publishing

projects in ethnic minority regions. Provincial and local governments have also been ordered to invest more money in the industry.

Financial subsidies and preferential tax policies will also be introduced to support all facets of the ethnic language industry, including:

- a. Editing and publishing ethnic language works in all media, including videos, audio tapes, books, newspapers, and websites.
- b. Training editors and translators.
- c. Upgrading equipment and technology.
- d. Promoting the export of ethnic language publications.
- e. Publishing ethnic language teaching materials. The central government will share any losses resulting from this industry equally with provincial governments.

The plan also requires central and provincial governments to support the industry through public benefit activities, such as providing books to rural areas, building libraries in ethnic regions and creating distribution channels for ethnic language publications.

*Source: CMM Intelligence – November 2007*

### China's local media companies list on domestic markets

Guangdong China Sunshine Media became the first media company to receive approval from the General Administration of Press and Publication (GAPP) and list on the domestic market when it

launched its successful Initial Public Offering (IPO) on 16 November 2007. A newspaper service company owned by Guangzhou Daily Newspaper Group, Guangdong Sunshine Media, focuses on advertising, printing and book retail. It currently has exclusive rights to the recruitment column in Guangzhou Daily Newspaper.

China only recently provided local media organizations like newspapers, publishing houses and websites the go-ahead to list on domestic and overseas stock exchanges.

The Liaoning Publishing Group listed on the A-share market in Shanghai on last December 21. Other 13 local newspapers and publishing groups are expected to prepare to follow suit with listings of their own.

China may introduce a cap on foreign ownership of listed papers in the future, but GAPP Director Liu Binjie said no decisions have been made on the limits.

*Source: China Media Monitor – November 2007, Business Week, [www.chinaviwe.cn](http://www.chinaviwe.cn).*

### **DTV, IPTV and Mobile TV merge in Shanxi Province**

China Education TV, Shanxi CATV Network, Shanxi Netcom, Shanxi Mobile and Shanxi Digital Culture and Media recently announced the launch of the Shanxi Digital TV Education Information Network.

The partnership is the first of its kind in China. It will allow subscribers to access Video on Demand (VOD) services for educational programs provided by China Education TV and other local producers via a set-top box, Internet Protocol TV (IPTV) network and mobile phone network.

*Source: CMM Intelligence – November 2007*

### **Mobile phone game players expected to top 16 million in 2007**

The mobile phone game market in China was expected to generate an operating revenue of RMB110 million (11 million euro) by the end of 2007, according to a China Venture report.

The report estimates the market may grow by as much as 343.8% more than 2006, with 16 million mobile phone game players hooked up by the end of 2007. Looking forward, operating revenue is expected to hit RMB380 million (38 million euro) by the end of 2008.

China Venture predicts the mobile game industry has a bright future with the imminent development of the 3G phone market, as a large number of Chinese mobile users already pay for value-added services. By 2010, the total number of mobile gamers is forecast to hit 154 million.

*Source: CMM Intelligence – November 2007*

### **China's 21 million DTV subscribers satisfied customers**

According to the State Administration of Radio, Film and Television (SARFT) China has 21 million digital TV (DTV) subscribers and their numbers are expected to exceed 23 million by the beginning of 2008.

According to the Guideline Research report released at a recent forum on DTV subscriber satisfaction levels, 80.03% of DTV subscribers are satisfied with services and 24% of them are willing to pay for value-added services. Almost 100 cable digital TV operators from all over China attended the forum.

*Source: CMM Intelligence – November 2007*

## China Unicom launches mobile People's Daily

People's Daily officially launched the mobile phone edition of its newspaper on the China Unicom network on last December 12. The People's Daily claims around 160 million mobile phone users have already signed up to receive the service for just RMB5 (50 cents of euro) per month. China Unicom says it will promote the value-added features of the new mobile newspaper in 2008.

*Source: CMM Intelligence – December 2007*

## The Chinese video-sharing site Youku.com has received €17 million of funding

Chinese video-sharing site Youku.com has received €11.5 million in a third round of funding. The investment round brings its total backing to €27 million since the company's launch in 2006. Youku is backed by venture capital firms Brookside Capital, Sutter Hill Ventures, Farallon Capital and Chengwei Ventures.

Like popular site YouTube, Youku features high-speed streaming of user-generated video. The Shanghai-based company is the most popular video sharing site in China, getting 70 million daily video views and more than 60 million unique visitors per month. Youku plans to use the investment on server groups, broadband service, and site operation, according to a company statement.

Youku has built a name for itself by breaking stories that were later picked up by major Chinese and international media. Chinese TV stations such as CCTV and Shanghai TV have used video from Youku's user-generated content.

In November 2007 Youku announced a deal with China's leading Internet portal, Sohu.com. The two companies plan to work to-

gether to grow the online video industry in China and 'promote video-based citizen journalism and user-generated content.' Sutter Hill Ventures partner Len Baker, a member of Youku's board, said that the company has 'very good relations with government,' despite the sensitive nature of uncensored news in China. 'In China you can't criticize the government directly,' he said. 'But there is plenty of scope for entertainment and news that people are interested in'.

Youku's largest Chinese rivals are Tudou.com ([www.tudou.com](http://www.tudou.com)) and 56.com ([www.56.com](http://www.56.com)).

*Source: [www.redherring.com](http://www.redherring.com) – November 2007*

## TV stations focused on TV dramas in 2007

TV dramas dominated Chinese television in 2007, accounting for 24.1% of the content broadcast on all TV channels and 33.9% of audience ratings. The heads of CVSC-SOFRES Media (CSM), a joint venture between the CTR Market Research (a leading market research company in China) and TNS Group (one of the largest custom market research company), released the figures at a seminar on national cooperation and development of film and TV dramas on last December 7. The numbers follow the trend established in 2006, when TV dramas accounted for 22.9% of the broadcast content and 32.3% of audience ratings. After TV dramas, the most popular programs in order of rank were news, entertainment news, movies, lifestyle and children's programs.

*Source: CMM Intelligence – December 2007*

## Chinese Netizens Soon World's Largest

China had 210 million Internet users at the end of 2007 and its online population is on course to

become the world's largest at the beginning of 2008.

There was only a gap of 5 million between the Chinese and US Internet populations, according to a survey released by the China Internet Network Information Center (CNNIC). China's Internet penetration ratio has risen to 16%, although it is still below the world average of 19.1%.

Last year, 73 million people were added to the nation's total netizen population. Of the increment, 29.17 million (40%) lived in rural areas. This brought the number of rural Internet users to 52.62 million at the end of 2007, up 127.7% year-on-year. The impressive growth was largely due to government efforts to extend telephone links to villages and Internet services to townships.

According to the CNNIC survey, 181 million netizens (86.6%) used the Internet for musical entertainment, while nearly 170 million (81.4%) used it for real-time telecommunications. Among other major uses: 73.6% browsed for news, 72.4% used search engines, and 59.3% played games. E-mail services were utilized by 56.5% of the Internet users.

The CNNIC web site said that in 2007, the number of users under age 18 and above 30 increased rapidly, but it did not give any details. At the end of 2007, users aged 18-24 accounted for 31.8% of the total and those aged 25-30 made up 18.1%. The proportion of netizens aged 31-35 was 12%.

Of the total, 57.2% were male and 42.8% were female. Approximately one-third of the total surfed the Internet at net cafes.

*Source: Xinhua News Agency - January 2008*

### **New Shenzhen Publishing and Distribution Group set up**

The Shenzhen Seasky Publishing House and Shenzhen Distribu-

tion Group merged their publishing and distribution businesses into a single entity called the Shenzhen Publishing and Distribution Group on 20 November 2007.

Publishing and print distribution businesses are usually run by separate, if closely related entities in China. However, the press release on the merger says the new company has been set up to better respond to market changes.

The Shenzhen Distribution Group was established in 2004. It owned Shenzhen Xinhua Bookstore and 17 subsidiary businesses involved in the distribution and sales of audio-video products, foreign and domestic books, office products and software, plus real estate and advertising. It had more than RMB900 million (90 million euro) in assets and generated more than RMB500 million (50 million euro) in annual sales revenue.

Shenzhen Seasky House was established in September 1984. It published more than 600 titles every year and at least half of these titles were reprints. Three hundred titles have been honored with awards from the central, provincial and local government entities.

*Source: CMM Intelligence - December 2007*

### **Nokia Siemens signs deal with China Mobile Group Beijing**

China Mobile Group Beijing Ltd. (CMBJ) has selected Nokia Siemens Networks to expand its General Packet Radio Services (GPRS) core network.

Nokia Siemens Networks' solution will enable CMBJ to increase its packet core network capacity in a cost-efficient way and launch new mobile data applications. The company said millions of additional visitors will use their mobile phones in Beijing during August 2008 to stay up to date with the

results of the hundreds of sport events or to send messages to their friends at home. That is why CMBJ wants to do more than expand its packet core network capacity in a cost efficient manner, it said. The solution also has to be reality-proofed and stable. Both criteria are perfectly met by the packet core solution from Nokia Siemens Networks. It provides one of the highest and most intensively tested user capacities in the market.

'As the telecommunications service provider for Beijing 2008 Olympic Games, our goal is to provide advanced technology, rich applications and high quality services to respond to the needs of our customers. This expansion paves the way for convenient data services by using a proven platform supplied by Nokia Siemens Networks,' said Li Zhijie, Deputy General Manager of Network Department, China Mobile Group Beijing Ltd.

Source: [www.marketwatch.com](http://www.marketwatch.com) – December 2007

### **Internet: Chinese Baidu.com in Nasdaq 100**

Chinese Baidu.com is the first company in China to be listed on Nasdaq 100, the US electronic stock market. Baidu.com is the most important Internet research engine in China, a kind of Chinese 'Google'. The listing took place in early December. After the announcement, the company's stock hit 2.2%.

Source: AGI/Reuters - December 2007

### **SMG announces plans to launch new channels**

Shanghai Media Group (SMG) plans to replace its MTV Channel and Arts Channel with a single Art and Culture Channel on January 1 2008. When he announced the restructure on December 11 2007, SMG President Li Ruigang said the move would stop the two channels

from producing programs with overlapping content. Integrating the content of the two channels will also cut the number of programs the group produces by two-thirds, freeing up resources for a new Foreign Language Channel. SMG plans to launch the first Foreign Language Channel in Shanghai at the start of 2008. The channel will broadcast nineteen hours of English and Japanese language programs every day, including news, fashion, entertainment and lifestyle, sports, talk shows, movies and drama series.

Source: CMM Intelligence – December 2007

### **China's mobile phone users top 515 million**

China's mobile phone users exceeded 515 million by the end of 2007, with a monthly rise of 6.8 million on average, according to statistics from the Ministry of Information Industry (MII). Chinese cell phone users had sent a total of 378.5 billion short text messages by the end of August 2007, up 38.3% year on year. Since 2006, China's rural areas have seen a continued demand for cell phones, which also boosted the handset output, the MII said. According to the Ministry, China produced 347.6 million mobile phones between January and August 2007, up 28% over the same period in 2006.

Meanwhile, the number of fixed-line subscribers remained almost the same as last month's 372 million and the number of newly-added fixed-line users averaged only 579,000 per month, barely one tenth of that of mobile users. The ministry also said that the revenue of the country's post and telecommunications services reached RMB475.29 billion (47.53 billion euro) in the first eight months in 2007.

Source: Xinhua – November 2007

## EVENTS, CONFERENCES and BOOKS ABOUT CHINA

China Media Observatory, Lugano.

### ■ China Digital Television Summit

Beijing, China, March 21-23.

The main theme of China Digital Television Summit (CDTS) is "Welcome the Great Year of Digitalization". CDTS host three specials: "Digital Terrestrial Television" (DTT) about comprehensively starting DTT planning, wireless transmission and coverage, DTT technology and innovation, industrialization of DTT new services; "Cable Network" focusing on discussing the deployment of cable network VAS, technique selection for two-way network rebuilding; "New Media Industry", about new media technique supporting system, industry policy and trends, digital family, and especially about the development status and next-step development trends of CMMB Olympics strategy. For more information, visit: <http://www.rti.cn/ccbn2008/>

### ■ China Content Broadcasting Network 2008

Beijing, China, March 21-23.

The China Content Broadcasting Network (CCBN) holds its 16th annual Conference at the China International Exhibition Centre. It is one of the world's largest exhibitions of Digital TV and broadband network industries. Decision-makers in the broadcasting world use CCBN as a key opportunity to make equipment purchases and gain access to the latest trends in digital broadcasting. CCBN is also a crucial window for China and Asia's administrative organizations to better understand and participate in the development of the digital broadcasting industry.

[http://www.ccbn.tv/conferenceinfo/conferenceinfo\\_home.asp](http://www.ccbn.tv/conferenceinfo/conferenceinfo_home.asp)

## New & Notable Books

SARFT, *Guangdian lanpishu. 2007nian zhongguo guangbo dianying dianshi fazhan baogao* [Blue Book of China's Radio, Film and Television. Report on Development of China's Radio, Film and Television 2007], Xinhua Publishing House, Beijing, China.

A report edited every year by the State Administration of Radio, Film and Television, the regulating authority of the broadcasting industry and the audiovisual sector in China, which provides a thorough analysis of the state of development of the Chinese audiovisual industry in the past year. The focus is on the relevant policies adopted, the technological development and the administration of this industry, as well as the TV drama market, the program production, the advertising market and new audiovisual media. The final section is dedicated both to specific researches about the main ongoing trends and to a case analysis related to the Chinese radio, film and television players that have distinguished themselves in the past year.

Keane, Michael A., 2007, *Created in China: the Great New Leap Forward*, Routledge, London.

This book is about China's creative economy and how television, animation, advertising, design, publishing and digital games are reshaping traditional understanding of culture. Since the 1950s 'Made in China' was one approach to global competitiveness at the expense of innovation. China imports creativity and worries about its 'cultural exports deficit'. In the cultural sector Chinese audiences are attracted to Korean, Taiwanese, and Japanese culture, as well as Hollywood cinema. Keane examines how new ways of managing cultural assets can renovate largely non-competitive Chinese cultural industries. Together with a history of cultural commerce in China, the book details developments in new creative industries and provides the international context for creative cluster policy in Beijing and Shanghai.

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