

**Station Break: A History of
Regional Commercial Television
Ownership and Control**

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Abstract

This thesis aims to critically examine the factors which have influenced regional commercial television ownership and control in Australia from the 1950s to the mid-2010s.

Chapter one charts the nexus between the introduction of radio in the 1920s and that of television from the 1950s. Particular attention is given to examining the various precedents set during the first two stages of the television development program.

Chapter two considers the regulatory foundations which created lucrative regional monopolies controlled by independent local interests in the early 1960s. It then analyses the economic imperatives to establishing joint-station operations and relay arrangements which created the first regional networks during the late 1960s and early 1970s.

Chapter three examines the corporate ambitions of would-be regional television moguls who were positioning themselves for future structural changes during the late 1970s and early 1980s. It continues by investigating the political directives which destroyed existing monopolies and subordinated the tenuous independence of

regional stations to metropolitan television interests in the late 1980s and early 1990s.

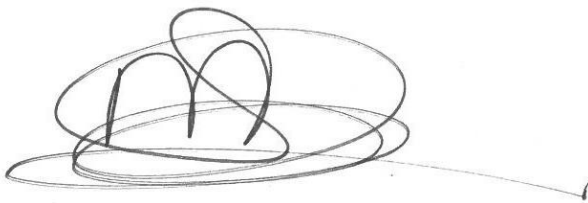
Chapter four probes the digital protections provided to incumbent operators in the late 1990s and early 2000s. It then explores the technical disruptions which have threatened the traditional commercial television business model during the late 2000s and early 2010s.

A key feature of this study has been the calculation of an “independence quotient” at critical points in the industry’s history. This measure reveals the industry was at its most independent in 1963 (100 per cent) from whence it has gradually declined to its lowest level of independence by 2015 (11 per cent).

This study concludes by considering the relationship between these earlier influences and proposed changes to existing media ownership rules which, if adopted, would likely herald the demise of regional commercial television as a distinct entity.

Statement of Candidate

I certify that the work in this thesis entitled Station Break: A History of Regional Commercial Television Ownership and Control has not previously been submitted for a degree nor has it been submitted as part of the requirements for a degree to any other university or institution other than Macquarie University. I also certify that the thesis is an original piece of research and it has been written by me. Any help and assistance that I have received in my research work and the preparation of the thesis itself have been appropriately acknowledged. In addition, I certify that all information sources and literature used are indicated in the thesis. The research presented in this thesis was approved by Macquarie University Ethics Review Committee, reference number 5201500387, effective 27 May 2015. This research meets the requirements of the National Statement on Ethical Conduct in Human Research (2007).

A handwritten signature in black ink, consisting of several overlapping loops and a long horizontal stroke extending to the right.

Michael Thurlow (43557600)

9 October 2015

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I would like to thank the staffs of the Macquarie University Library, the State Library of New South Wales and the National Library of Australia for their assistance in locating materials and navigating online resources and databases. I am especially thankful to Teresa Garcia from the Australian Communications and Media Authority (ACMA) library.

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I am, above all, deeply grateful to my supervisor, Professor Bridget Griffen-Foley, for her unwavering support, exceptional knowledge, sage advice and unquestionable professionalism. Bridget's stewardship has enabled me to make this small contribution to what has been described as the erratic but colourful patchwork quilt that is the writing of Australia's media history.

Abbreviations

ABA	Australian Broadcasting Authority
ABC	Australian Broadcasting Commission, later Australian Broadcasting Corporation
ABCB	Australian Broadcasting Control Board (“Board”)
ABT	Australian Broadcasting Tribunal
ACCC	Australian Competition and Consumer Commission
ACMA	Australian Communications and Media Authority
AGPS	Australian Government Publishing Service
ATF	Australian Television Facilities Pty Ltd
<i>B&T</i>	<i>Broadcasting and Television</i> magazine
BTCE	Bureau of Transport and Communications Economics
CITSA	Committee of Inquiry into Telecommunications Services in Australia
CRC	Convergence Review Committee
CTL	Country Television Services Ltd
DCA	Department of Communications and the Arts
DOC	Department of Communications
DOM	Department of Media
DTC	Department of Transport and Communications
FTA	Free-to-air
GPL	George Patterson Pty Ltd

HORSCITA	House of Representatives Standing Committee on Communications, Information, Technology and the Arts
HORSCOTCI	House of Representatives Standing Committee on Transport, Communications and Infrastructure
JSCBL	Joint Select Committee on Broadcasting Legislation
JV	Joint venture
MCS	Multi-channel services
PMG	Postmaster-General's Department
PROCOM	Productivity Commission
PTD	Postal & Telecommunications Department
RCTS	Remote Commercial Television Service
RTA	Regional Television Australia Pty Ltd
SSCESA	Senate Standing Committee on Education, Science and the Arts
SSCOTE	Senate Standing Committee on Television Equalisation
TRL	Television and Radio Laboratories Pty Ltd
TWL	Television Wollongong Transmissions Ltd
VCL	Victorian Country Telecasters Pty Ltd
WBL	Wide Bay-Burnett Television Ltd

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Introduction

I hope this thing will not come to Australia within my term of my office (Prime Minister R. G. Menzies, 1952; quoted in Inglis 2006a, p. 193)

This thesis aims to critically examine the factors which have influenced regional commercial television station ownership and control in Australia from the 1950s to the 2010s.

Regional communities across Australia have access to three primary commercial television channels as well as the Australian Broadcasting Corporation (ABC) and Special Broadcasting Service (SBS). The majority of these regional stations are controlled by either Prime Media Group Ltd (ASX: PRT; “Prime”), WIN Corporation Pty Ltd (“WIN”), or Southern Cross Media Group Ltd (ASX: SXL; “Southern Cross”). These regional networks are, in turn, variously affiliated with each of the three metropolitan networks – Seven, Nine and Ten – for program supply purposes (see ACMA 2013; 2015).

This arrangement provides country viewers with the same level of choice as their metropolitan counterparts. But this has arguably come at a cost to localism. Prior to the early 1990s, most regional areas were served by just one local commercial television station

plus the ABC. Australia's first regional commercial television station - GLV-10 Latrobe Valley - was put to air across eastern Victoria from its Traralgon studios on 9 December 1961.¹ Thirty-five commercial television stations were put to air across regional Australia in multiple stages between 1961 and 1977 (see Appendices A, C and E). Three remote commercial television service (RCTS) licences were also granted during the 1980s (see Appendix G).

Commercial television has long been regarded as an extremely profitable business enterprise. In 1957, Canadian newspaper owner Lord Thomson observed that, "It's just like having a licence to print your own money" (BTCE 1996, p. 59). The publicity which followed the upheaval in the Australian television industry in the late 1980s did nothing to discredit this widely-held view, with stations changing hands for enormous sums of money. Regional stations retained their lucrative monopolies until the aggregation of commercial television markets in regional Queensland, New South Wales and Victoria (and later Tasmania) during the late 1980s and early 1990s. This was followed by the granting of supplementary

¹ The opening of Australia's first regional station highlights the nexus of power between politics and the media. GLV-10 commenced operation on 9 December 1961, the day of the Federal election, two weeks ahead of BCV-8 and GMV-6, which both commenced on 23 December 1961. The timing of this decision suggests it may have been, at least in part, a gesture by "old friends" to support the Country Party to retain the seat of East Gippsland following the retirement of long-serving MP George Bowden in 1961.

licences to incumbent operators in less populous areas during the late 1990s and early 2000s (see Appendices N, O, P & T).²

The history of CBN-8 Central Tablelands illustrates the typical changes in ownership and status of a regional commercial television station. Country Television Services Ltd was formed in 1959 and was principally sponsored by local radio broadcasting, newspaper and business interests (ABCB 1960, p. 43). In August 1960, the consortium was granted the CBN-8 Central Tablelands licence. In mid-1960, the company commenced construction of its Orange studios and Mount Canobolas transmitter. The station commenced test transmissions on 16 February 1962 ahead of its official opening on 17 March (CTL 1983b).

In 1963, the company was granted the adjoining Central Western Slopes licence (ABCB 1963, pp. 27-28). CWN-6 Central Tablelands commenced operation from its Mount Cenn Cruaich transmitter in the Warrumbungle Mountains near Coonabarabran as a full relay of CBN-8 on 1 December 1965 (ABCB 1966). In 1968, the station gained access to a PMG microwave link which enabled the direct relay of news and other programs from Sydney. In July 1973, the company entered into an agreement with MTN-9 Murrumbidgee Irrigation Areas to provide that station with up to 95 per cent of its programs on direct relay.

² The terms “equalisation” and “aggregation” are explained on p. 76.

In 1975, the station commenced colour transmissions and also established a permanent off-air link between Sydney and Orange for the pick-up of network programs from ATN-7 and TCN-9 (CTL 1983b).

During its first 25 years of operation, the station originated many local programs including news (*MidState Television News*), current affairs (*Roving Eye*, *Focus*), children's (*Romper Room*, *Children's World*, *Early Shift*), cooking (*Kitchen Club*, *Cooking with Jan*, *Cooking with Di Coffey*, *Fun Cooking with Bob Fenn*), "women's" (*Home Is What You Make It*, *Myer Service Session*), quiz (*Jackpot Quiz*, *Chalk It Up*), entertainment (*Search For Talent*, *Matinee Melody*), religious (*Time to Live*), documentary (*Goin' Down The Road*),³ political commentary (*Meet Your Member*), education (*Around The Schools*), sports (*Sports Action*) and rural affairs (*Farming Today*, *Rural Roundup*) (CTL 1983b). By the early 1980s, the station was known on-air as "MidState Television".

In 1983, businessman Sam Gazal acquired 19.9 per cent of the issued share capital in Country Television Services Ltd (CTL 1983a). In 1985, Gazal's Roslyndale Securities Pty Ltd gained control of the company and the CBN-8/CWN-6 licences (CTL 1986). In the mid-1980s, CBN-8/CWN-6 (under independent ownership) joined with RVN-2/AMV-4 stations to form "The Prime Network" for the joint sale of air time

³ *Goin' Down The Road* received a 1979 Logie Award for Outstanding Contribution by a Regional Station (*TV Week* 1979).

to national advertisers. By this time, the station employed more than 100 people. Paul Ramsay's Ramcorp Ltd acquired CBN-8/CWN-6 in 1988 (ABT 1988b). In 1989, the Southern NSW market was aggregated and the station, known on-air as "Prime Television", became a Seven affiliate. Production of all local, non-network programs except news was ceased by the early 1990s. Playout was centralised to Prime's Canberra television centre in the late 2010s. On 6 August 2010, presentation of *Prime News Central West* was also transferred from Orange to Canberra (ABC 2010). The Bathurst Road studios were closed later that year after 48 years of operation. Prime's 10 remaining news and sales staff were relocated to a shop-front office.

In many respects, this case study shows the diminishing status of regional commercial television stations over the past 60 years. Studio buildings, once a source of civic pride for many communities, have been gutted or demolished across regional Australia as local program production has ceased, staff have been made redundant and network operations have been centralised to state or national broadcasting hubs. This decline is also a barometer for the gradual decrease in localism which had, in the early years, been a core objective of the government's television policy.

There are currently 54 commercial television licences across regional Australia (see Appendix U). These licences are operated by

34 licensee companies which are ultimately controlled by six entities. These include the dominant Prime, WIN, and Southern Cross networks which control more than 80 per cent of licences through direct ownership or joint ventures. Seven West Media Ltd (ASX: SWM; “Seven”) and Nine Entertainment Co. Holdings Ltd (ASX: NEC; “Nine”) also directly control a small number of regional licences. Imparja Television Pty Ltd (“Imparja”) serves markets in Central Australia and is the country’s only Indigenous-owned and operated regional commercial television station (Bell 2008). Ten Network Holdings Ltd (ASX: TEN; “Ten”) is the only major metropolitan network not to operate a regional commercial television licence.

The story behind this shift from local, independent stations to regional networking is significant for several reasons. Firstly, it offers a logical entry point for understanding the institutional history of Australia’s regional commercial television stations. Secondly, it provides an opportunity to analyse the means by which stakeholders have sought to simultaneously use and alter the underpinning structures of ownership and control to achieve and maintain political, economic and/or social power. Thirdly, it offers an historical backdrop against which to critically examine proposed changes to media ownership rules which are currently being considered by the Federal government. Finally, it provides a meaningful foundation for writing a more detailed and broad-ranging

history of Australia's regional commercial television stations which is currently missing from the media historiography.

The story of regional commercial television station ownership and control contains the elements of drama, comedy, entertainment, politics and intrigue present in their program schedules. Yet, paradoxically, for an industry which frequently trades on telling others' stories, its own story has never been told. In the context of pending structural change, there is a risk this story will be lost forever unless proactive steps are taken to record it.

Context

The consolidation of regional commercial television station ownership and control over the past 60 years has resulted from the interplay of six primary influences. Significantly, this project has established that each of these six influences has had a particularly formative impact at specific points in the sector's history (see Table 1). This schema provides a basis for addressing the key questions of "who, what, when, where, why and how" in relation to each of these influences.

Table 1: Primary Influences/Themes

Primary Influence	Period
Regulatory Foundations	Pre-inception and early 1960s
Economic Imperatives	Late 1960s and early 1970s
Corporate Ambitions	Late 1970s and early 1980s
Political Directives	Late 1980s and early 1990s
Digital Protections	Late 1990s and early 2000s
Technical Disruptions	Late 2000s and early 2010s

The thesis title is both deliberate and significant. “Station break” is a technical term which refers to a pause, break or intermission in a radio or television program for identification of the network or station (Reed & Reed 1992, pp. 510-511). In practice, this device is intended to assist with continuity by providing a bridge from one program item to the next. The history of regional commercial television station ownership and control has, however, been anything but constant. “Station break” has thus been chosen to signify the disruptive impact of the six primary influences on regional commercial television ownership and control in Australia over the past 60 years.

This thesis is an example of television history. Television history, however, sits within a broader field of broadcast history, which is but one strand of media history, which sits within media studies, which in turn might be regarded as a sub-discipline of cultural studies. The project also has secondary links to the fields of modern history, economics and politics. It has been inspired by the

work of prominent international broadcast historians including Barnouw (1966-1970) and Briggs (1961-95), whose respective, voluminous histories of radio and television broadcasting in the US and UK are often cited as the seminal works in this area. Hilmes' various histories of both American and British broadcasting have also made a well-regarded contribution to the field (see Hilmes 1997; 2001; 2003; 2012).

Corner (2003, pp. 273-280) identifies five approaches - institutional, professional, textual, sociocultural, and technological - for historically engaging with the medium. Hartley et al. (2007, p. 20) further distinguish between "trade or popular books", "academic texts" and "incidental works". These categories have provided a useful means by which to filter and examine the existing literature.

Scholars from numerous fields argue that structural factors such as ownership and control enable media organisations to serve and propagandise on behalf of the powerful societal interests that control and finance them. Political economy thus offers a framework (see Herman & Chomsky 1988; Mosco 1996; Golding & Murdock 1997; McChesney 2008) through which to examine the interplay of the six primary influences which have shaped Australian station ownership and control over the past 60 years.

Historiography

Australia's television history has been "shamelessly neglected" for many years by media and other historians (Jacka 2007, ix; Hartley et al. 2007, p. 8). This neglect is an extension of a long-established and recognised trend in national and international spheres (Curran 1991; Corner 1999; Wheatley 2007; Bailey 2012; Conboy & Steel 2015). Pickering (2015, p. 9) cites a devaluation of history in media studies which he argues is an entrenched and recurring, if not endemic, problem. Corner (1999, p. 126) refers to the "frantically contemporary agenda" of media studies. Taylor (2001, p. 174) argues that "[w]hatever can be said for the future of television, its past has not been served well by historians".

The writing of media history in Australia has been described as resembling the growth of an erratic but colourful patchwork quilt (Griffen-Foley & McKnight 2001, p. 5). The study of Australian television can be traced to the first decade of its existence. O'Brien (1964) provides what is arguably the first institutional "stocktake" of the industry soon after its establishment. MacCallum (1968, p. 7), whose work was "not meant to be a history of Australian television", offers a useful survey of the industry in its early years which (somewhat prophetically, given current developments) highlights the consequences of "too many stations in

too few hands". Hall's *Supertoy* (1976) was released at the medium's twentieth anniversary and provides one of the earliest serious critiques of Australian television.

The institutional and professional histories produced since then can mostly be categorised as trade or popular books. These works demonstrate "the full spectrum of 'anecdotal', 'folklore' and 'ideological' treatments" (Hartley et al. 2007, p. 20).

Commemorative, or folkloric, accounts comprise the most expansive sub-category. Several such works were released from early 1980s to celebrate and memorialise the medium at significant milestones (Hall 1981; Beilby 1981; Davies 1981; Beck 1984) and during the mid-2000s to mark television's golden jubilee (Luck 2005; Clark & Samuelson 2006; Horgan 2006; Place & Roberts 2006). Such works – some of which have been described, perhaps unkindly, by Hartley et al. (2007, p. 21) as "scrapbooks" – play an important role in recording television as popular culture but are arguably of limited academic value. In any case, these publications contain few references to regional commercial television.

The majority of anecdotal histories and biographical works have been constructed by or about metropolitan television identities (see Griffen-Foley 2006, pp. 35-6) and institutions (see Stone 2000; Stone 2008). Many might also be classified as little more than a

vehicle for self-promotion (see Grundy 2010; Boland 2014; Tabberer 1999; Buckley 2015). The late Peter Andren, a former television news editor and independent member for the Federal seat of Calare, provides a brief glimpse into his time at CBN-8 Central Tablelands from the 1970s to the 1990s however much of this memoir is focused on the author's political career (Andren 2003).

The "ideological treatments" (see Hartley et al. 2007, p. 20) almost exclusively focus on public (Bowden & Borchers 2006; Inglis 2006a; Inglis 2006b), ethnic (Ang et al. 2008) or Indigenous broadcasting (Bell 2008). The "official" histories of ATN-7 Sydney and ATV-10 Melbourne were respectively penned by Seven public relations head Simon Francis (and others) in 1996 and Ten news reader Mal Walden in 2003 to commemorate the first four decades of those stations (Francis et al. 1996; Walden 2003).

Whilst there are numerous popular books on television history, there remains surprisingly few academic texts on the subject (Hartley et al., 2007, p. 20). Jacka (2004, p. 37) cites Curthoys' pioneering essays on the coming of television (Curthoys 1986; 1991) as the authoritative departure point for any history of Australian television. Hazlehurst (1983, pp. 104-119) also provides a useful account of the advent of commercial television in Australia. There remains, however, no "institutional" history of the ilk produced by

Barnouw (1966) in the United States and Briggs (1995) in the United Kingdom, which are frequently cited as the seminal works of their type. Regulation is covered in several Australian works however these pre-date the significant structural changes such as equalisation which have occurred in regional commercial television since the late 1980s (Armstrong 1982; Bonney & Wilson 1983; O'Regan 1988). Digital broadcasting policy and regulation are featured in more recent works (Given 1998, 2003; Kenyon 2007).

Since the 1980s, media studies academics in Australia have, for the most part, neglected television history in favour of studying contemporary television (Jacka 2004, p. 36). Approaches have included textual analysis and the aesthetics of television (Bowles & Turnbull 1994); cultural studies analysis of television programs and their audiences (Tulloch & Turner 1989; Cunningham & Miller 1994); studies of the television industry or television production (Moran 1982, 1985; Tulloch & Moran 1986); or all of these combined (Turner & Cunningham 2000). O'Regan (1993) offers an analysis of contemporary television while providing some historical perspective.

Other works have focused on television as a sociocultural phenomenon, or "television's shifting meanings within everyday life" (Wheatley 2007, p. 7). Cunningham & Jacka (1996) describe the globalisation of television marketplaces and examine the television

cultures of the countries which import Australian programs. McKee (2001) presents a history of Australian television from the point of view of its programs and the way in which audiences view them. Darian-Smith & Turnbull (2012, p. 1) examine the intersection of the histories of television in Australia “with the growing field of memory studies to create new understandings of the cultural, social, institutional and political meanings of television in our everyday lives”. This latter edited work is particularly notable for documenting the frustrations of rural populations across south-eastern Australia in obtaining a viable signal during the early years of television (see Hanson 2012, pp. 110-131). Finally, there is the study of “television as technology”. Corner (2003, p. 276) argues this area remains somewhat neglected. This is certainly the case within the Australian record although Given’s contributions (1998, 2003) arguably extend to this sub-field.

Several recent histories of television (particularly of commercial television), such as those by Turner & Cunningham (2000) and Harrington (see Cunningham & Turnbull 2014), have either been written within the context of “something else” or, as in the case of Moran & Keating (2009), intended as a historical dictionary. Such “incidental histories” (Hartley et al. 2007, p. 20) offer a high-level chronology of commercial television over an extended period of time, but are unable to go deeper. Other works, such as O’Regan and

Shoesmith's (1985) history of television in Western Australia, are almost entirely focused on the metropolitan stations. Herd (2012) provides the most recent detailed account of commercial television however the history of regional stations is, somewhat tellingly, largely subsumed by that of the metropolitan networks.

Several theses have also made useful contributions to the field. These include examinations of the commercial television licence grant and renewal processes by Blundell (1966) and Harrison (1986) as well as studies of broadcasting policy and regulation by Armstrong (1975), Lane (1987) and Kerley (1992). East's (1998) study of aggregation, Flynn's (2008) analysis of local content and Flew's (2001) examination of broadcast media policy and the regulation of commercial television between 1972 and 2000 have focused on important aspects of regional commercial television history.

The fiftieth anniversary of television in 2006 arguably "provided the occasion for renewed academic attention to the history of television" (Jacka, 2007: ix). Despite such interest, the writing of media history in Australia remains fragmented. Griffen-Foley's *A Companion to the Australian Media* includes several relevant entries including commercial television, aggregation, media ownership and regional broadcasting. This edited work has made a significant contribution to the field by simultaneously bringing together the

disparate threads of Australian media history, surfacing omissions in the record and providing a basis for further scholarly research (Griffen-Foley, 2014).

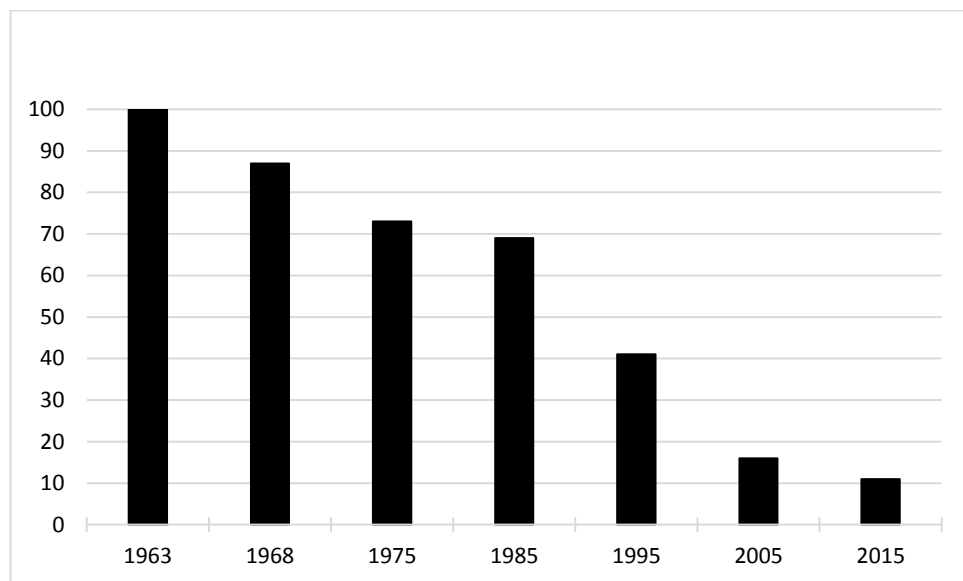
It seems that, after a period of neglect, there is an increasing interest in the history of Australian television. The literature is, however, highly fragmented and deficient in many respects. There is a danger that acceptance of the (albeit dominant) metropolitan commercial television history as *the* history of commercial television can lead to what Jacka (2004, p. 31) describes as “a generalisation of patterns which may be true for one as if they were universal”.

There exists an opportunity to adopt what scholars have described as a “pragmatic” and “common sense” approach to writing a history of regional commercial television (Jacka 2004, p. 30). Such an approach would use the categories in which the institution offers itself for examination. Cunningham’s framework (and Harrington’s subsequent update), which considers five key dimensions – industry, regulation, technology, programming and audiences – across five distinct but related time periods provides a suitable basis for such an examination (Turner & Cunningham 2000, pp. 14-15; Harrington 2014, pp. 173-191).

Methodology

The starting point for this project has been to overlay the number of licences, licensees and controlling entities across the time period under examination.⁴ This calculation of the total number of controlling entities as a percentage of the total number of active licences has produced an “independence quotient”. This measure enables a comparative analysis of the relative independence of the sector at critical points in its history (see Figure A).

Figure A: Independence Quotient, 1963-2015



Source: see Appendices B, D, F, G, M, Q & U.

⁴ It is important to distinguish between a “licensee” as the operator of a commercial television licence and a “controlling entity” which might control one or more licensee companies (and therefore one or more licences).

On this basis, the industry was at its most independent in 1963 following the third stage in the television development program. By 1968 – the year in which the highest number of controlling entities were participating in the industry following completion of stage four – relative independence had fallen to 87 per cent with 30 stations ultimately controlled by 26 entities (see Appendix D). By the mid-2010s, the independence quotient was 11 per cent, which represented the sector at its least independent.

This project has utilised a wide range of source materials including company records, archival materials, photographs and audio-visual materials from the Prime, WIN and Southern Cross television networks. It has also drawn heavily on primary sources and archival materials from the National Library of Australia and state libraries (e.g. ABCB, ABT and ABA reports, Hansard and Trove), the Australian Communications and Media Authority (e.g. ACMA reports), the National Archives of Australia (e.g. Cabinet minutes and official correspondence)⁵ as well as industry periodicals and more than 40 national, metropolitan and regional newspapers.⁶

⁵ It has not been possible to gain access to certain “closed” files held by the NAA (e.g. industry submissions to SSCOTE), which require Office of the Senate approval, within the available timeframe. It is likely that a request to access such files will be made as part of a PhD-level thesis project on regional commercial television.

⁶ The records of the National Film and Sound Archive (NFSA) have not been of central relevance to this study.

Structure

The mapping of the six primary influences to specific time periods enables both a thematic and chronological approach to be taken.

Chapter one charts the nexus between the introduction of radio in the 1920s and that of television from the 1950s. Particular attention is given to examining the various precedents set during the first two stages of the television development program.

Chapter two considers the regulatory foundations which created lucrative regional monopolies controlled by independent local interests in the early 1960s. It then analyses the economic imperatives to establishing joint-station operations and relay arrangements which created the first regional networks during the late 1960s and early 1970s.

Chapter three examines the corporate ambitions of would-be regional television moguls who were positioning themselves for future structural changes during the late 1970s and early 1980s. It continues by investigating the political directives which destroyed existing monopolies and subordinated the tenuous independence of regional stations to metropolitan television interests in the late 1980s and early 1990s.

Chapter four probes the digital protections provided to incumbent operators in the late 1990s and early 2000s. It then explores the technical disruptions which have threatened the traditional commercial television business model during the late 2000s and early 2010s.

This study concludes by considering the relationship between these earlier influences and proposed changes to existing media ownership rules which, if adopted, would likely herald the demise of regional commercial television as a distinct entity.

Chapter 1: New Toys for Old Friends

Television was technology, entertainment, a new vision of the future ... It was also a mysterious new toy and, and the Menzies-Fadden government liked to entrust new toys to old friends (Hall 1976, p. 12)

The factors which influenced the introduction of television during the 1950s can be traced to the commencement of radio in the 1920s. This nexus is significant as early regulation of the latter established important precedents for ownership and control of the former. The regulation of television might therefore be regarded as a *fait accompli* given efforts to control radio from its earliest days.

In May 1923, the country's first wireless conference recommended a regulatory board comprising representatives of government, broadcasting stations, manufacturers, traders and the press but the proposal was rejected by the Postmaster-General's Department (PMG). In 1924, a further broadcasting conference agreed on the need for "open sets" and for a bifurcation of the Australian broadcasting system: A-class stations were to be maintained by revenue from listeners' subscriptions, and B-class stations were to operate privately. The PMG was also given responsibility for approving the

constitution of a company applying for a commercial licence, directing the broadcasting of items of national interest, and determining how programs were to be censored. The country's first "B-class" station, 2BE, went to air in Sydney on 7 November 1924 (Griffen-Foley 2009, pp. 5-9). By this time, the allocation of broadcasting licences was already susceptible to political patronage (Armstrong 1982, p. 36).

In 1928, Australia's first television company, Television and Radio Laboratories Pty Ltd (TRL), was established "to provide country newspapers with pictures of current events minutes after they occurred" (*The Mercury* 1939, p. 12). On 10 January 1929, the company conducted Australia's first tests of "radiovision" using the transmitter of radio station 3UZ Melbourne (TRL 1929, p. 1). These primitive broadcasts featured simple animated silhouette films alternated with printed titles and spoken announcements. The first image transmitted was that of a rotating windmill; other subjects included "a leopard which [would] bound in, take its tail off, put it back on ... then bound out again" (Long 2010, p. 64). Similar tests using the rival Baird system were conducted by radio station 3DB Melbourne the following week (TRL 1929, p. 1).

The new medium soon attracted the attention of the general public and amateur technicians as well as nefarious business interests.⁷ In one instance, TRL received a dubious request to use its equipment to conduct bogus clairvoyant séances: “The idea was to have a [TV] transmitter in one room, and they’d have a client from whom they’d obtained a photograph of their ‘dear departed’, and they were going to transmit the image from another room” (Long 2010, p. 66). The Postmaster-General, H. P. Brown, perhaps in response to such questionable commercial applications, banned radio stations from publicising test transmissions as a condition of granting licences and warned the public against investing in the new technology: “The ultimate introduction of a broadcasting television service will be controlled by the broadcasting stations to be established under the government’s new scheme” (Long 2010, p. 65).

This early account demonstrates that television in Australia has, from its earliest days, been subject to a series of distinct but inter-related regulatory, economic, corporate, political and technical influences. It also characterises the often-competing objectives and encapsulates the tensions which have long existed between those who have sought to profit from the “business” of television and those who have sought to regulate it. In any case,

⁷ This example is distinct from legitimate and sincere efforts, such as those by radio pioneer and AWA founding director Ernest Fisk, to use technology to make contact with the dead (see Nairn & Serle 1981, p. 510).

and despite TRL's early efforts, the Great Depression ensured it would be at least another decade before the government gave serious consideration to the introduction of "radio with pictures".

On 3 July 1941, a Joint Parliamentary Committee on Wireless Broadcasting (otherwise known as the Gibson Committee after its chair, Senator W. G. Gibson) was appointed to undertake a comprehensive review of broadcasting in Australia. On 5 March 1942, the Committee recommended that a Parliamentary Standing Committee be constituted and that television services should not be introduced until further consideration had been given by this Committee (Parliament 1942, pp. 5, 69-70).

On 12 June 1942, the Australian Broadcasting Act 1942 was proclaimed for the "maintenance, development and regulation" of the Australian broadcasting system. This new legislation sought to consolidate various provisions made under the Wireless Telegraphy Act 1905 as well as the Australian Broadcasting Commission Act 1932 (ABCB 1949, p. 4). On 3 September 1942, the Parliamentary Standing Committee on Broadcasting was appointed to determine "in what manner, and to what extent, these new features [including television and facsimile transmissions] should be incorporated in the domestic broadcasting system of the Commonwealth of Australia". The Committee would anticipate many of the debates concerning the ownership and

regulation of television that would continue for the next fourteen years (see Curthoys 1986, pp. 123-154). It was, however, considered inopportune to deal with the majority of matters until after the Second World War (Parliament 1946, p. 4). In June 1946, the Committee recommended that experimental television transmission should be confined to the ABC however commercial interests should not be precluded from co-operating (Parliament 1946, p. 40).

On 28 September 1948, the government announced it would introduce legislation “to provide for the establishment of a special board to control broadcasting, television and other like services in the Commonwealth” (ABCB 1949, p. 4). In October 1948, the Australian Broadcasting Act 1942 was amended to accommodate this change. The Bill also reduced the powers of the Postmaster-General by requiring him to consult a board which had exclusive concern with broadcasting issues and which would report independently to Parliament (Curthoys 1986, p. 127). Furthermore, it prohibited the minister outright from granting a commercial television licence. Labor Prime Minister Ben Chifley justified the decision by arguing that “television belong[s] to the people, whom the government represents”. The Liberal-Country Party coalition regarded the Bill as yet more proof of the government’s socialistic and communistic tendencies, with one Senator describing it as “the most insidious and dangerous attack upon the Australian way of life”. The Senator warned the changes

which would take the country “one step further towards the development of a totalitarian state” in which the “[c]onditioning of the minds of the people will commence” (Curthoys 1986, pp. 128-130).

These concerns were soon added to by others including foreign ownership of commercial stations; Australian content and quotas; inequality between urban and rural areas posed by the great expense of providing services for scattered populations; and television’s moral, educational and political consequences (Curthoys 1986, p. 124).

The last issue, in particular, drew representations from a wide range of critics including church, cultural, educational and women’s groups, who feared “[t]elevision is going to be one of the big menaces of the future” (see Curthoys 1986; 1991). In 1951, critic W.A. Clarke cited the American example of how television was supposedly eroding family values:

People are tearing down bookshelves, bureaus; slinging out cocktail cabinets; generally playing havoc with their domestic ensembles so that a “viewing room” can be established.

This correspondent expressed particular concern for the wellbeing of children, who “are refusing to study or eat because taking meals or studying is a waste of good viewing time” (Clarke 1951, p. 9).

Such anxieties no doubt informed the establishment of the Australian Broadcasting Control Board, which commenced as the country’s first statutory regulator of broadcasting on 15 March 1949. The Board’s primary responsibilities were to ensure the provision of services by radio stations, television stations and facsimile stations, and services of a like kind; that technical equipment and the operation of stations was in accordance with appropriate standards and practices; and that adequate and comprehensive programmes were provided to serve the best interests of the general public (ABCB 1949, p. 6).

In June 1950, the recently-elected Menzies Liberal-Country Party government announced a change in television policy: firstly, that television be developed on a gradual scale; secondly, that services would initially be established in Sydney; and thirdly, that one commercial television licence be issued in Sydney and Melbourne and in any other capital city where an applicant’s capacity to provide a service justified the issue of a licence. Consideration would also be given to the extension of services to other capital cities and the larger provincial centres (ABCB 1950, p. 24). This revised

policy reflected the earlier approach in radio of a largely national role for the ABC and a regional or local role for commercial services (DOC 1984, p. 34).

On 11 February 1953, the Royal Commission on Television was appointed to investigate various matters in relation to the medium (Parliament 1954, p. 7). Crucially, the Commission's terms of reference did not extend to considering whether television should be provided as a single or dual system. In March 1953, the Television Act 1953 provided the legislative authority for the establishment of both national and commercial television services (Parliament 1954, p. 9). The government also endorsed the principle that television should be developed on the same dual system basis "as has been so remarkably successful in respect of sound broadcasting", with a national service to be provided by the ABC and supplemented by local services provided by commercial interests (Hansard 1953, p. 32).

On 20 February 1954, the Royal Commission made a series of recommendations which closely followed the policy and legislation already announced by the government (DOC 1984, p. 35). It also recommended the eventual expansion of services beyond the capital cities to "other centres of population" (Parliament 1954, pp. 102-106). Interestingly, the Commission also considered imposing a licence condition on metropolitan stations to operate a country

station as this would “in certain circumstances ... assist in furthering the extension of television to the country” (Parliament 1954, p. 73), however this suggestion was never adopted as policy.

On 10 September 1954 the PMG, Larry Anthony, announced the broad conclusions of the Royal Commission’s report had been accepted and reaffirmed the government’s decision to proceed with the introduction of a dual system of television through a number of stages (ABCB 1954, p. 11). On 19 April 1956 the Broadcasting and Television Bill was introduced in the House of Representatives to amend the law relating to the administration and regulation of broadcasting and television services in Australia. The Bill provided for the repeal of the Television Act 1953 and, generally speaking, integrated the broadcasting and television provisions with significant amendments into a single legislative structure. The resultant Broadcasting and Television Act 1942-1956 took effect on 1 July 1956 (ABCB 1956, p. 3).

Call signs were not a legislative requirement but – as with radio – were adopted as an administrative device for identifying individual stations. Many stations, particularly at the time of their launch, incorporated their call sign into their on-air identities. It appears that commercial television licensees chose their call signs based on a template of two letters of choice followed by the first

letter of the state in which the station was located. In most cases, the first two letters were a representation of the licensee company's name or geographical location (ACMA 2009).

The first stage in the government's television development program saw the establishment of a national service and two commercial services in both Sydney and Melbourne (Australia 1954; ABCB 1955a). Australia's first metropolitan commercial television station, TCN-9 Sydney, commenced regular transmissions on 16 September 1956. HSV-7 Melbourne commenced regular transmissions on 4 November 1956. The first national stations, ABV-2 Melbourne and ABN-2 Sydney, opened on 5 November 1956 and 18 November 1956 respectively. ATN-7 Sydney, that city's second commercial station, was officially opened on 2 December 1956. GTV-9 Melbourne, that city's second commercial station, commenced test transmissions in September 1956 ahead of its official opening on 19 January 1957 (ABCB 1957, p. 28).

On 4 September 1957 the new PMG, Charles Davidson, advised the House of Representatives that planning had commenced for stage two of the television development program. This would see the extension of both a national and commercial station to each of Brisbane, Adelaide, Hobart and Perth. Significantly, the Minister's notice of 24 October 1957 did not specify the number of licences to be granted in each case (Australia 1957, p. 3258). On 25 July 1958 the Board

recommended that one commercial licence only should be granted in both Brisbane and Adelaide (ABCB 1958a, p. 31). The Board also recommended that one commercial licence should be granted in both Perth and Hobart (ABCB 1958c, pp. 13-14).

The government did not, however, accept the PMG's recommendations and decided that two licences should be granted in each city (Hansard 1958, p. 1126). This development was largely due to lobbying from the Sydney and Melbourne stations who were concerned that granting just one licence would endanger their capacity for future networking deals (Hall 1976, p 26). The Board was instructed to reconsider the Brisbane and Adelaide licences and subsequently recommended in favour of companies which were largely owned in varying proportions by local residents, and local, interstate and overseas newspaper and broadcasting interests (ABCB 1958b, p. 7). This early episode demonstrated the willingness and ability of the government to override its regulator in order to show favour to powerful media interests and would set an important precedent for future relations. By this stage, "the irrelevance of what the Control Board thought was obvious" (Hall 1976, p. 26; also see MacCallum 1968, p. 13).

Stage two stations commenced with the opening of QTQ-9 Brisbane on 16 August 1959. This was followed by NWS-9 Adelaide on 5 September

1959, TVW-7 Perth on 16 October 1959, ADS-7 Adelaide on 24 October 1959, BTQ-7 Brisbane on 1 November 1959 and TVT-6 Hobart on 23 May 1960 (ABCB 1960a, p. 25).⁸

The metropolitan stations, particularly the Fairfax-controlled ATN-7 Sydney and Packer-controlled GTV-9 Melbourne, had always envisaged they would be “factories for the production of Australian content” (Herd 2012, p. 96). The establishment of large-scale networks would give these manufacturers the means to quickly and cheaply distribute their products to stations around Australia. O’Regan (1988, p. 134) suggests that pressures to simultaneously network between metropolitan and regional stations would have been greater had television been introduced more quickly.

This notion of networking is central to concepts of ownership and control (see Herd 2012; 2014). O’Regan (1988, pp. 126-143) describes the economic, technological, political and ideological obstacles to networking from the 1950s to the 1980s. Australian television had so far evolved under an umbrella of two policies: the “localism policy” and the “two-station policy”. The first encouraged local ownership and content. The second, which limited ownership to a maximum of two television stations in different markets, was intended to promote a

⁸ The TVT-6 Hobart licence was granted during stage two of the television development program and has therefore not been classified as a regional station for the purposes of this study until the aggregation of commercial television services in Tasmania in 1994.

relatively decentralised ownership structure. Cutting across these policies were the economic imperatives to create a national television market for both advertising and programs. Given the manner in which stations had been licenced, certain government decisions and the economics and structure of the television industry, the establishment of program acquisition and distribution networks was arguably inevitable (DOC 1984, p. 157).

In October 1963, it was announced that stations formerly known as the “Channel 9 Network” – TCN-9 Sydney, GTV-9 Melbourne, QTQ-9 Brisbane and NWS-9 Adelaide – as well as NBN-3 Newcastle and WIN-4 Wollongong would be known as the National Television Network. Similarly, in December 1963, it was announced that the stations formerly known as “Network 7” – ATN-7 Sydney, HSV-7 Melbourne, BTQ-7 Brisbane and ADS-0 Adelaide – would be known as the Australian Television Network (BTCE 1996, p. 41)

The introduction of radio to Australia in the 1920s thus provided both a guarantee and framework for the regulation of television from the 1950s. These were built upon during the first two stages of the government’s television development program, which established the procedural arrangements for granting licences and also set important precedents regarding the claim by broadcasting and newspaper interests on the world of television. The willingness of the

government to override its regulator, and the willingness of that regulator to be overridden, defined the power dynamic which now existed between the executive and its bureaucracy. The arrangements thus laid down during this pre-inception period would have a profound influence on setting “the pattern for the provision of television services to all other parts of the Commonwealth” during subsequent stages of the government’s television development program (ABCB 1960b, p. 137).

Chapter 2: Regulatory Foundations and Economic Imperatives

This chapter considers the regulatory foundations which influenced station ownership and control during the early 1960s. These include: (a) the decision to grant a single licence in each area; (b) the determination that stations should be controlled by people with a “real interest” in the areas concerned; (c) the preferencing of entities that were principally sponsored by local newspaper and/or radio interests; and (d) early changes to media ownership rules to support broader policies of independence and localism.

It then examines the economic imperatives to provide a viable service in provincial areas which resulted in greater connections between regional stations during the late 1960s and early 1970s. These include: (a) the early establishment of program acquisition networks; (b) the granting of new licences to “outside” interests in adjoining markets; (c) an increase in two-station ownership; (d) the widespread adoption of relay; and (e) the creation of the first promotional networks.

Regulatory Foundations

The grant of a commercial television licence is a privilege of great public importance, especially to the people in the area in which the station is established (ABCB 1958a, p. 26)

The early 1960s were characterised by regulatory attempts to establish a regional commercial television sector which was largely controlled by local entities that were independent of metropolitan interests. The Australian government, like governments in many other countries, has long retained a particular interest in broadcasting policy because television, as a major source of entertainment and information, has the potential to greatly influence community attitudes and values. It can exert pressure on political processes and it can also be a means of replacing national cultural values with those from other countries, whether intentionally or unintentionally (BTCE 1996, p. 6). According to Brown & Cave (1992, p. 379), normative theories of regulation start from the proposition that government pursues certain “benign objectives” and intervenes in the broadcasting system in the pursuit of “economic” and/or “social” goals. Economic regulation is mostly concerned with limiting market power and/or political influence, or “to avert the market failures or departures from efficiency to which an unregulated system would otherwise be prey”. Social regulation is

concerned with matters of “public interest” such as “the protection of the population from unsuitable broadcasting material or the development of national culture” (BTCE 1996, p. 6-10).

The period commenced with stage three in the government’s television development program. On 21 May 1959 PMG Davidson invited applications for commercial television licences to service the Canberra, Newcastle-Hunter River, Illawarra (Wollongong), Richmond-Tweed Heads (Lismore), Central Tablelands (Orange), Ballarat, Bendigo, Goulburn Valley (Shepparton), La Trobe Valley (Traralgon), Darling Downs (Toowoomba), Townsville, Rockhampton and North Eastern Tasmania (Launceston) regions (Australia 1959, p. 1772). In extending its call for applications, the government had decided that the number of commercial licences should not necessarily be limited to one and that, subject to technical considerations and to the quality of the applicants, more than one commercial service in each area might be licenced (Hansard 1959, pp. 1783-4).

During its inquiries, the Board considered the number and nature of television services to be established as well as the extent to which television licensees should be “independent” of the major metropolitan television networks. In this context, the concepts of “independence” and “association” referred to by the Minister related specifically to “financial” independence and association (Hansard

1959, p. 170). On 8 November 1960 the PMG's Department accepted the Board's recommendations and the successful applicants were announced in the House of Representatives (Hansard 1960, pp. 2546-7). Stage three stations were put to air over two years commencing with GLV-10 Latrobe Valley on 9 December 1961 and concluding with RTQ-7 Rockhampton on 7 September 1963 (see Appendix A).

In granting the first provincial licences, the government had decided, with the urging of the Country Party side of the coalition, that the most economic and technically viable option would be to grant a single licence in each area. In assessing the viability of each applicant, the Board had found that (a) two independent local companies not associated with a metropolitan station presenting their own programmes could not operate profitably; (b) two stations operating on the relay system as advocated by the applicants associated with metropolitan stations could operate successfully in competition with one another in several areas; (c) a local independent company not associated with a metropolitan station presenting its own programmes could not operate successfully if operating in competition with a station operating on the relay system; and (d) one local independent company not associated with a metropolitan station could operate profitably in the areas under consideration (ABCB 1960b, pp. 114-16). The result of this process

was the creation of potentially lucrative monopolies across regional Australia.

The government had also determined that stations should be controlled, in practice, by people who had some real interest in the areas concerned (ABCB 1960b, p. 138). This principle was further reinforced through the Board's recommendation that licensee companies (a) make at least 50 per cent of their issued capital available to the general public and (b) not enter into an exclusive arrangement with any metropolitan station for the provision of programmes or the sale of station time or advertising (Hansard 1960, pp. 2546-7).⁹ In all cases, the successful applicants for stage three licences were neither directly nor indirectly associated with any metropolitan commercial television station at the time of making their applications (ABCB 1960b, pp. 86-7).

The government also accepted that – as far as practicable – licences should be granted to companies which had local newspaper and radio interests as major shareholders (ABCB 1955b, p. 30). This decision, whilst consistent with the ABCB's preference during stages one and two of the television development program that applicants should

⁹ In practice, the licensee company was required to provide a formal undertaking that it would not enter into any exclusive arrangement with any other commercial television station for the provision of programs. Upon receipt of the undertaking, the Minister would grant the licence without inclusion of a condition (DOC 1984, p. 47).

have a good record in allied fields (see ABCB 1955a, p. 18), raised concerns that “new toys” were being handed to “old friends” (if not country cousins) thus creating a media monopoly in each area (ABCB 1960b, p. 150; Hall 1976, p. 11). The Board argued that local provincial and country newspapers and broadcasting stations had established an important and honourable track record and that the association of local newspaper and radio interests – “with their experience and knowledge of local interest not elsewhere easily obtainable” – was an advantage rather than a disadvantage, as well as a “natural development” (ABCB 1960b, p. 151). In all cases, the successful applicants for stage three licences had been principally sponsored by local newspaper, radio and/or motion picture theatre interests at the time of making their applications (ABCB 1960b, pp. 13-76).

These early years also gave rise to the first major clash between regional and metropolitan television interests. In the mid-1950s, TCN-9 Sydney’s Frank Packer had approached Newcastle Broadcasting and Television Ltd (NBN) and Television Wollongong Transmissions Ltd (WIN) with offers of financial and program assistance. Similar offers were received from Fairfax Ltd’s Rupert Henderson and Macquarie Broadcasting’s Jim Oswin on behalf of ATN-7 Sydney. The stations rejected these offers and responded by establishing Australian Television Facilities Pty Ltd (see page 48). This in

turn, prompted threats from Henderson and Packer to disrupt the supply of programs. By early 1962, both Packer and Henderson had made good on their threats (Herd 2012, p. 102). The PMG raised the issue with a number of film distributors - including NBC International Pty Ltd, CBS Films Pty Ltd, Warner Bros. Pty Ltd and Screen Gems Pty Ltd - which confirmed they had been faced with the choice of supplying programs to either WIN and NBN or the Sydney stations (ABCB 1963b, p. 35). In early 1963, the Minister gave notice of his intention to impose further licence conditions which would prevent a licensee from obstructing the supply of programs to any other station.

The Sydney stations responded by instituting proceedings in the High Court to declare the proposed licence conditions invalid. In August 1963, the High Court found the PMG had no power to impose the intended conditions on licensees (ABCB 1964, p. 36). The ruling effectively neutered the PMG's Department and left the Newcastle and Wollongong stations with few options other than to concede to the demands of their more powerful metropolitan counterparts. The impasse was resolved through the transfer of 200,000 shares in the Newcastle station to each of Frank Packer's Australian Consolidated Press Ltd and Rupert Murdoch's News Ltd.

The provincial stations eventually became mere pawns in a much larger game of political and economic brinkmanship between Packer and Murdoch. By 1963, Murdoch's Mirror Newspapers Ltd had also acquired a major interest in WIN-4 Wollongong (ABCB 1963b, p. 34). Murdoch then threatened to use this interest to enter the Sydney market when it became clear he would not be granted the third licence for that city: "[W]e had no intention of confining it to a country audience. There are two million Sydney viewers within WIN's range, and we intend to get after them" (B&T 1963, p. 1). The prospect of competition from Murdoch brought Packer to the negotiating table. In a transaction which became known as the "Murdoch deal", the latter offered the former a 25 per cent stake in TCN-9 Sydney (Herd 2012, p. 103). By mid-1964, Packer's Consolidated Press Holdings Ltd had also acquired a financial interest in the Wollongong station (ABCB 1964, p. 32). The result was that both Packer and Murdoch now had a commercial interest in seeing that all regional stations had access to the programming they controlled (Herd 2012, p. 103).

The period also saw important changes to existing media ownership rules. The government had thus far asserted that ownership and control of commercial television should be in as many hands as practical. The Broadcasting and Television Act 1942 restricted ownership to one station in each capital city and no more than two

in the whole country, however “the last part was [soon] little more than a hope”. In 1960, it was found necessary to amend the Act following increased concentration in ownership and control among the Sydney, Melbourne and Brisbane stations. The amendments, which specified ownership as an ability to control more than 15 per cent of the voting rights of a company, were devised as an attempt to extend the concept of control beyond that of “legal” control to include “practical and commercial control by any means” (Hall 1976, p. 40-41).

This distinction between “legal” and “economic” control is important within the context of ownership. Bonney & Wilson (1983, p. 35) point out that economic owners are in control by virtue of their economic power, whereas legal owners, unless they also have economic power, are not. Thus, in media, those with the economic power also control the means of production, distribution and commodification of the message.

On 17 December 1964, the PMG announced further changes after “some companies had been able to adopt devices to circumvent the intentions of the law, as it then stood” (SSCESA 1973, p. 24).¹⁰ The Act was subsequently amended to introduce the concept of a

¹⁰ The 1965 changes to the Broadcasting and Television Act 1942 were triggered by the discovery that Frank Packer had acquired an interest in the third Brisbane station in addition TCN-9 Sydney and GTV-9 Melbourne (see Herd 2012, pp. 79-80).

prescribed interest, which was set at five per cent of both shares and voting stock, above which a person was deemed to be in control (Herd 2012, p. 80). These changes finally froze the station ownership issue but also “consolidated the power of those already in possession” since existing shareholdings above five per cent were grandfathered (Hall 1976, p. 41).

The regulatory foundations which underpinned the establishment of Australia’s first regional stations were intended to strike a balance between local relevance, operational independence and economic viability. In this regard, the Board was successful in achieving its objectives. The completion of stage three had established 13 stations which were controlled by 13 entities (see Appendix B). The independence quotient in these early years was 100 per cent, which represented the industry at its most independent.

This independence would, however, be both tenuous and relatively short-lived. The “Murdoch deal” was a significant moment in the political economy of regional commercial television and demonstrated the extent to which powerful metropolitan media interests were both willing and able to dominate their regional counterparts. The consequences of the coalition government’s decision to establish lucrative regional monopolies to the exclusion of these metropolitan interests would stalk the sector for decades to come.

Economic Imperatives

The establishment of stations in [these] areas ... raises different questions from those ... in the more populous areas ... It is evident that they are, for the most part, areas ... where the prospects of commercial operation are marginal (ABCB 1963, p. 7).

The late 1960s and early 1970s were characterised by an increase in cooperative “networking” arrangements. Ironically, it was the “tyranny of distance” that brought provincial stations together.¹¹ Program acquisition networks (for obtaining rights to Australian- and overseas-produced programs or commissioning programs in Australia) had already emerged in the early 1960s. Program delivery networks (for the delivery of programs via relay between member stations) were widely adopted in the late 1960s and early 1970s. Promotional networks (for the joint sale of air time to national advertisers across multiple stations) had crystallised by the mid-1970s (see DOC 1984, pp. 141-147). Program distribution networks, which more directly connected regional and metropolitan stations, would become commonplace from the late 1970s (see page 59).

¹¹ The phrase “tyranny of distance” was coined by historian Geoffrey Blainey (1966) to describe how Australia’s geographical remoteness has been central to shaping its history and identity. In this context, the “tyranny of distance” refers to the challenges faced by regional stations in acquiring and sharing a limited number of film prints over vast distances within reasonable timeframes.

The mid-1960s witnessed the establishment of stage four stations in the government's television development program.¹² On 30 November 1961, PMG Davidson had invited applications for stage four which would see services extended - over several rounds - to a further 17 regional areas. The first round sought applicants to operate stations in the Upper Namoi (Tamworth), South Western Slopes and Eastern Riverina (Wagga Wagga), Grafton-Kempsey (Coffs Harbour), Upper Murray (Albury), Wide Bay (Maryborough) and Spencer Gulf (Port Pirie) areas. Licences were subsequently granted for all areas except the Spencer Gulf region (ABCB 1962a, p. 5).

The second round sought applicants for the Manning River (Taree), Central Western Slopes (Dubbo), Murrumbidgee Irrigation Areas (Griffith), Bega-Cooma, Broken Hill, Mildura, Murray Valley, Cairns, Mackay, Southern Downs (Warwick), South East SA (Mount Gambier), Bunbury, and the Central and Southern Agricultural Areas of Western Australia. Licences were subsequently granted for all areas except the Bega-Cooma, Murray Valley, and Central and Southern Agricultural areas of Western Australia (ABCB 1963a, p. 63).

¹² The fifth stage of the government's television development program established a second station in both Adelaide and Perth and a third station in both Sydney and Melbourne between 1 August 1964 and 26 July 1965 (ABCB 1969, p. 81).

On 26 November 1964 the new PMG, Alan Hulme, again invited licence applications for these latter regions. Licences were subsequently granted for the Spencer Gulf and Southern Agricultural regions only (ABCB 1965, p. 21; 1966, p. 10). Stage four stations were put to air over four years commencing with RVN-2 South-Western Slopes on 19 June 1964 and concluding with BKN-7 Broken Hill on 16 August 1968 (see Appendix C).

On 17 May 1967, the Federal government announced a sixth stage in its television development program. On 21 August 1969, PMG Hulme invited applications for three commercial television licences to service the Darwin, Kalgoorlie and Mount Isa regions. On completion of its inquiries the Board recommended that a commercial television licence be granted for all three areas (ABCB 1970, p. 22). These initial stage six stations were put to air over a three-month period commencing with ITQ-8 Mount Isa on 11 September 1971 and concluding with VEW-8 Kalgoorlie on 9 December 1971 (see Appendix E).

The establishment of stations in less populous areas raised different questions to those faced in earlier stages of the television development program. The first question to be considered was the likely financial success of such stations since "it would be a matter of serious concern if the public, having been encouraged to purchase receivers, were deprived of a commercial service in any

area because of the failure by the station on financial grounds” (ABCB 1963a, p. 8). There was some discussion regarding the minimum population needed to support a commercial television station however the Board concluded that “no general rule can be safely adopted and that the prospects of each area must be assessed according to its own circumstances” (ABCB 1963a, p. 8)

The unique economic challenges faced by regional stations required creative and cooperative solutions. Queensland Provincial Telecasters Pty Ltd (which comprised the applicants for TNQ, RTQ and DDQ) was formed to acquire programs for member stations in regional Queensland. Victorian Country Telecasters Pty Ltd (which comprised the applicants for BCV, BTV, GLV and GMV) was established “to facilitate economic and efficient operation of the individual operating companies” (VCL [n.d.], p. 2). Significantly, this consortium proposed to provide programs to its four member stations via microwave relay from a joint distribution centre in the Melbourne suburb of Lalor (ABCB 1960b, p. 107); however, this arrangement did not eventuate. The most durable program acquisition network would be Australian Television Facilities Pty Ltd (ATF), a joint film exchange and facilities company which had been established by the stage three stations. It was formed “specifically for the purpose of purchasing or hiring programmes on a co-operative basis” following the earlier threat from the Sydney stations to

disrupt program supplies (see p. 44). ATF, which later become Regional Television Australia (RTA), gave the regionals a level of bargaining power which was disproportionate to their size (Herd 2012, p. 169).

The stations also faced significant costs associated with the introduction of colour. On 27 February 1969, the PMG announced the PAL (Phase Alternation Line) system would be used for colour television in Australia (Lord 1973, p. 1). On 2 December 1970, the Cabinet considered an ABCB proposal that colour should be introduced on 1 July 1973 but decided to defer its decision. In early 1971, the ABCB calculated the capital cost of equipping country stations for colour at \$12.37 million with increased operating costs of \$10.35 million over six years (Hulme 1972, p. 4). Such outlays represented the greatest expenditures to be incurred by country stations since establishment. Station operators lobbied for a firm start date to be fixed as this would assist with long-term financial planning. On 15 February 1972, Prime Minister William McMahon announced that:

Colour Television services will be inaugurated in Australia as from 1 March 1975, with transmission commencing at any time after that date provided the Broadcasting Control Board's technical standards are met (Lord 1973, p. 2)

In the early 1970s, RTA commenced financing and originating its own programs to ensure sufficient stocks would be available for the introduction of colour. In 1973, for example, RTA completed a 90-minute pilot for a police medical drama titled *Silent Number* starring Grigor Taylor and produced from the WIN-4 Wollongong studios (TWL 1973, p. 5). The Nine network subsequently commissioned two 26-episode series with most interiors shot at WIN-4 and NBN-3 Newcastle (see Storey 2013).

The economics of country television also called for flexibility from a licensing perspective. By the second half of stage four, the Board had adopted the view that, if there was a suitably qualified applicant from outside the area who was prepared to undertake the operation of a station in any of the areas concerned, it would recommend that a licence be granted notwithstanding the economic difficulties which were likely to be experienced (ABCB 1963b, p. 10). Thus three of the 12 late stage four licences were granted to existing operators in adjoining markets (ABCB 1962, p. 63). In all cases, these stations were placed on full and permanent relay from inception, thus establishing the first two-station regional networks (see Table 2).

Table 2: Joint Licence Grants, 1966-1975

Licensee (Primary Station)	Secondary Station
Country Television Services Ltd (CBN-8 Central Tablelands)	CWN-6 Central Western Slopes
South Western Telecasters Ltd (BTW-3 Bunbury)	GSW-9 Southern Agricultural
Darling Downs TV Ltd (DDQ-10 Darling Downs)	SDQ-4 Southern Downs

Source: ABCB 1962, 1963a.

The early 1970s were characterised by an increase in joint ownership (ABCB 1972, p. 84). In most cases, this resulted from the takeover of a less profitable station by a more profitable operator in an adjoining market (see Table 3). This tendency towards joint ownership further resulted in a number of stations being placed on permanent relay. In some cases, the parent station had earlier been an unsuccessful applicant for the other licence and had, at that time, proposed that extensive relay was the only means of providing a viable service to the area concerned (DOC 1984, pp. 152-153).

Table 3: Significant Acquisitions, 1966-1975

Primary Station	Secondary Station
Victorian Broadcasting Network Ltd (GLV-10 Latrobe Valley)	BCV-8 Bendigo
Telecasters North Queensland Ltd (TNQ-7 Townsville)	FNQ-10 Cairns
Northern Rivers Television Ltd (NRN-11 Grafton-Kempsey)	RTN-8 Richmond-Tweed Heads
Riverina and North East Victoria Television Ltd ¹³ (RVN-2 South West Slopes)	AMV-4 Upper Murray
Television New England Ltd (NEN-9 Upper Namoi)	ECN-8 Manning River
Spencer Gulf Telecasters Ltd (GTS-4 Spencer Gulf)	BKN-7 Broken Hill

Source: ABCB annual reports, 1966-75.

In three cases – namely ECN-8 Manning River,¹⁴ MTN-9 Murrumbidgee Irrigation Areas and STV-8 Mildura – stations had commenced ordinary operations but later experienced financial difficulties in continuing as such. They were then permitted by the government to take most or all of their programs on relay in order to ensure continuity of service to the communities concerned. By 1975, there were 11 relay arrangements in place across 20 regional stations (see Table 4).

¹³ Riverina Television Ltd was renamed Riverina and North East Victoria Television Ltd following its acquisition of Albury-Upper Murray TV Ltd in 1971.

¹⁴ ECN Manning River eventually ceased trading and the licence was acquired by Television New England Ltd, which operated the adjoining NEN-9 Upper Namoi licence.

Table 4: Program Delivery Networks, 1966-1975

Source Station	Relay Station
CBN-8 Central Tablelands	CWN-6 Central Western Slopes
BCV-8 Bendigo	GLV-10 Latrobe Valley
BTW-3 Bunbury	GSW-9 Southern Agricultural
DDQ-10 Darling Downs	SDQ-4 Southern Downs
TNQ-7 Townsville	FNQ-10 Cairns
NRN-11 Grafton-Kempsey	RTN-8 Richmond-Tweed Heads
RVN-2 South West Slopes	AMV-4 Upper Murray
CBN-8 Central Tablelands	MTN-9 Murrumbidgee Irrigation Areas
NEN-9 Upper Namoi	ECN-8 Manning River
BCV-8 Bendigo	STV-8 Mildura
GTS-4 Spencer Gulf	BKN-7 Broken Hill

Source: DOC 1984.

These relay arrangements thus established the first two- and three-station regional program delivery networks. It was, however, recognised at the time the first extensive relay arrangements were approved that a station receiving 90 to 100 per cent of its programs on a permanent relay basis was not being independently operated. The 1984 review of localism in Australian broadcasting found “it appears that alternative means of providing independently operated stations or alternative structures were not considered when extensive relaying was approved” (DOC 1984, p. 153).

In this context, it is worth noting the somewhat anomalous nature of the decision to grant the CWN-6 Central Western Slopes licence to an existing operator in an adjoining market, rather than a local

applicant. It could be argued that North Western Telecasters Ltd, a company to be sponsored by radio stations in Dubbo, Parkes, Mudgee and Bathurst as well as local newspaper, cinema and business interests (and chaired by a sitting member of the Legislative Assembly of NSW), was as “suitably qualified” from a technical perspective - and certainly more “local” in its interests - in comparison to the successful applicant, Country Television Services Ltd, which operated the CBN-8 Central Tablelands station at Orange (see ABCB 1962, pp. 24-28). Coincidentally, the chairman of Country Television Services Ltd, Jack Ridley, was well-known within broadcasting circles and had previously served on the ABCB’s NSW state broadcasting advisory committee (ABCB 1949, p. 12).

The early 1970s gave rise to several promotional networks (see Table 5). These arrangements enabled member stations to increase revenue through the joint promotion and sale of air time to national advertisers in conjunction with adjoining stations while remaining under independent ownership. Great Eastland Television was particularly significant as it represented the sixth largest television market in Australia behind Sydney, Melbourne, Brisbane, Adelaide and Perth (NRT 1975, p. 4).

Table 5: Promotional Networks, 1966-1975

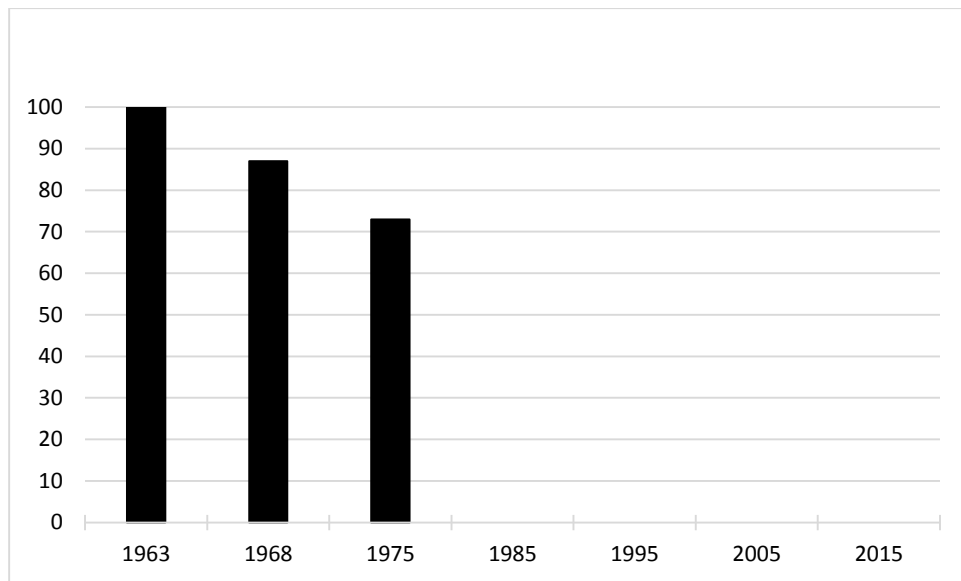
Promotional Network	Member Stations
CNQ Group	FNQ-10 Cairns TNQ-7 Townsville MVQ-6 Mackay RTQ-7 Rockhampton
Television 6-8-9 (later MidState Television)	CBN-8 Central Tablelands CWN-6 Central Western Slopes MTN-9 Murrumbidgee Irrigation Areas
Great Eastland Television (GET)	DDQ-10 Darling Downs SDQ-4 Southern Downs NEN-10 Northern Rivers RTN-8 Richmond-Tweed Heads NEN-9 Upper Namoi ECN-8 Manning River
Central & South East Qld Television (CSEQ)	RTQ-7 Rockhampton SEQ-8 Wide Bay ¹⁵

Source: DOC 1984.

By the end of 1975, there were 33 stations ultimately controlled by 24 entities. These included nine ownership groups which each controlled two stations (see Appendix F). In just over 10 years, the independence quotient had fallen by more than a quarter to 73 per cent (see Figure B).

¹⁵ In 1975, WBQ Wide Bay was granted permission to change its call sign to SEQ in recognition of its expanding influence across South East Queensland (WBL 1975, p. 4).

Figure B: Independence Quotient, 1963-1975



Source: see Appendices B, D & F.

The tendency towards joint ownership and co-operative networking during this period was imperative for the survival of many smaller stations. The establishment of these early networks increased the level of connectivity between stations and also created a small number of dominant ownership groups. The survival of the fittest approach which characterised this period would also facilitate the corporate ambitions of new and existing operators during the late 1970s and early 1980s.

Chapter 3: Corporate Ambitions and Political Directives

This chapter probes the corporate ambitions which influenced ownership and control during the late 1970s and early 1980s. These include: (a) the diversification of non-media businesses into regional commercial television; and (b) the emergence of several would-be regional television moguls who were positioning themselves to take advantage of proposed changes to media structures and ownership rules.

It also examines the political directives which caused major disruption to ownership and control structures during the late 1980s and early 1990s. These include: (a) the introduction of the first commercial satellite; (b) the proposed introduction of supplementary television licences; (c) the consideration of subscription television services; and (d) the equalisation of regional commercial television markets.

Corporate Ambitions

Let's face it, regional TV in the 1980s was a licence to print money. Stations paid very little for their programs because they were the sole buyers. It was a glorious situation (John D'Arcy, chairman ENT Ltd, quoted in Hutchinson 1993, p. 22).

The late 1970s and early 1980s were characterised by the acquisition of regional stations by non-media interests and an increase in networking from capital city stations. Herd (2012, p. 165) points to “a paradigm shift in the public attitude, towards both ownership and networking”. This, in turn, created an environment in which reform was sacrificed to political expediency. The result was that cultural and political boundaries began to be redrawn, with centralised corridors of information replacing regional and geographical divisions (O'Regan 1993, p. 23).

The period opened with delivery of the final phase in stage six of the government's television development program which resulted in the extension of services to the most marginal regional areas.¹⁶ On 7 February 1974, the Labor Minister for the Media, Douglas McClelland, had invited applications for three commercial television licences to

¹⁶ A seventh stage of the television development program, which commenced in 1971, dealt solely with the further extension of national (i.e. ABC) services to regional areas (ABCB 1974, pp. 98-100).

service the Geraldton, Loxton/Renmark and Mawson regions. The Board subsequently recommended that licences be granted for the first two areas and that a commercial translator relay licence be granted for the third (ABCB 1975a; 1975b; 1975c). These final stage six stations were put to air in 1976-77 (ABT 1977, p. 18) (see Appendix E).

The introduction of colour television in 1975 sparked a boom in revenue which quickly offset the high capital conversion costs. Over the next five years, advertising revenue across the industry grew by 260 per cent while the industry's share of total advertising revenue increased by 30 per cent (Herd 2012, p. 153). This was achieved despite the government's phasing out of lucrative cigarette advertising between 1973 and 1976. By 1980, commercial television had become the most profitable sector in the Australian economy. The biggest returns were to be had in regional television, where the combination of monopoly, rising advertising revenues and low programming costs, relative to metropolitan stations, contributed to high profit margins (Herd 2012, p. 154).

The late 1970s also gave rise to program distribution networks. These involved either "extensive" networking (which involves a major part of a station's hours of transmission); "regular" networking (where a station takes selected programs from a major network on a regular, ongoing basis, e.g. *National Nine News* or *The Mike Walsh*

Show); and “irregular” networking (where a station agrees to transmit a major network’s coverage of a special event, e.g. Olympic Games) (DOC 1984, p. 145). The reliance on “extensive” networking was, at this stage, confined to member stations in the Seven, Nine and Ten networks. The regionals had, to varying degrees, utilised “regular” and “irregular” networking arrangements with metropolitan stations since their establishment; this generally involved freighting film, and later video, around the country by road, rail or air. The availability of reliable microwave links meant those connections had become more widespread and frequent. By the late 1970s, relays were generally used by country stations for the pickup of news, sport and light entertainment, while freight continued to be used for most drama material (DOC 1984, p. 146).

Australia was, at this time, also being seduced by the attractions of neo-liberalism (Herd 2012, p. 164). The progressive deregulation of the finance sector had commenced with the raising of the interest rate ceilings on the banks under the Fraser government during the 1970s and gained momentum under the Hawke government during the early 1980s. The casino-style financial environment of the mid-1980s thus brought a new breed of speculative investor to the table. These entrepreneurs were the beneficiaries of a move towards a shareholder-value conception of control which valorised risky behaviour which created apparent wealth from poorly managed

companies and the popular media's growing fascination with "the romance of capitalism - the idea of the heroic entrepreneur who builds a better mousetrap and in doing so becomes deservedly wealthy" (Gilding 2004, p. 228). The business of commercial television - particularly regional television - was an obvious target as it was an established enterprise with handsome cash flows which could be used to finance debt (Herd, pp. 167-68).

Table 6: Significant Acquisitions, 1976-1985¹⁷

Acquirer	Station
Oberon Broadcasters Pty Ltd (Bruce Gordon)	WIN-4 Wollongong
K.M. Stokes Investments Pty Ltd (Kerry Stokes)	CTC-7 Canberra
Parry Corporation Ltd (Kevin Parry)	NBN-3 Newcastle ¹⁸ RTQ-7 Rockhampton (19%)
Roslyndale Securities Ltd (Sam Gazal)	CBN-8 Central Tablelands CWN-6 Central Western Slopes
Sabtel Ltd (Eva Presser)	STV-8 Mildura
Paul Ramsay Holdings Pty Ltd (Paul Ramsay)	RVN-2 South West Slopes AMV-4 Upper Murray
Universal Telecasters Ltd (Christopher Skase) ¹⁹	SEQ-8 Wide Bay

Source: ABCB, ABT, ABA, DOC annual reports.

¹⁷ See ABT 1980, p. 50; 1981, p. 61; 1983, pp. 21-25; 1984, p. 46; 1985, pp. 49, 108.

¹⁸ This acquisition was completed through the company's Hadjoin Pty Ltd subsidiary.

¹⁹ Skase's Universal Telecasters Ltd also acquired MVQ-6 Mackay before its parent company, Qintex Ltd, collapsed in late 1989.

The tightly-held ownership of stations in Sydney and Melbourne (and, to a lesser extent Brisbane and Adelaide) led to speculation in non-metropolitan areas (O'Regan 1988, p. 130). The period was notable for a rise in full or partial acquisitions of regional stations by interests whose main businesses had been outside television if not the media (see Table 6).

The "system" had, up to this point, favoured "cross-media links, often within the same market". It consequently encouraged media ownership by groups "whose main interest was within the media rather than other industries" (O'Regan 1988, p. 127). The scramble to gain control of Australia's regional commercial television stations was hardly surprising, given their (a) relatively low acquisition cost; (b) high levels of profitability; (c) base from which to exercise political influence; and (d) opportunities for even greater profitability through increased networking. Bonney & Wilson (1982, pp. 84-87) point to the 1982 battle for control of NBN-3 Newcastle by Hadjoin Pty Ltd (a Parry Corporation Ltd subsidiary) and Broadcast Investments Pty Ltd (a major shareholder) as "a clear illustration of the attractiveness to expanding companies of regional television stations with a monopoly of the commercial market".

The increased acquisition by non-media interests heralded the exit of many long-term proprietors. These men – including TNQ’s Jack Gleeson, CTC’s George Barlin, MTN’s Ray Gamble and GMV’s Peter Twomey – had played an integral role in establishing the stations during the 1960s and therefore had a long-term understanding of, and commitment to, the “business” of local television. They were replaced by a small number of would-be regional television moguls – most notably Kerry Stokes, Bruce Gordon, Kevin Parry, Sam Gazal, Paul Ramsay and Christopher Skase²⁰ – who were repositioning themselves as the beneficiaries of proposed changes to media ownership rules. These new entrants were keenly watched by both Rupert Murdoch and Kerry Packer (son of Sir Frank), who had their own views on the future direction of the industry (Herd 2012, p. 171).

These changes resulted in ownership of several regional stations being transferred to much larger corporations with a stake in a whole range of enterprises. In this way, the stations become outstations in a much larger kingdom and the “business” of television shifted from being a central to a peripheral concern. The hostile takeover of Henry Jones (IXL) Ltd by John Elliott in 1972 is a case in point: as representatives sifted through the Henry Jones

²⁰ Skase had dabbled in regional television as early as 1977 when he briefly joined the board of Victorian Broadcasting Network Ltd (GLV-8/BCV-8) and, in the early 1980s, Telecasters North Queensland Ltd (TNQ-7/FNQ-10) (see VBN 1977, p. 6; ABT 1983, pp. 15-24).

records to get a better idea of what they had bought, they found a subsidiary company called Murrumbidgee Television Ltd which operated the MTN-9 licence in Griffith. Despite their extensive research into Henry Jones before the takeover, the representatives had never heard of this component of the company (Westfield 2000, p. 23). Bonney & Wilson (1988, p. 67) argue the conglomeration of media businesses means that “rhetoric about the ‘fourth estate’ and the media’s ‘watchdog’ role takes on an increasingly threadbare aspect”.

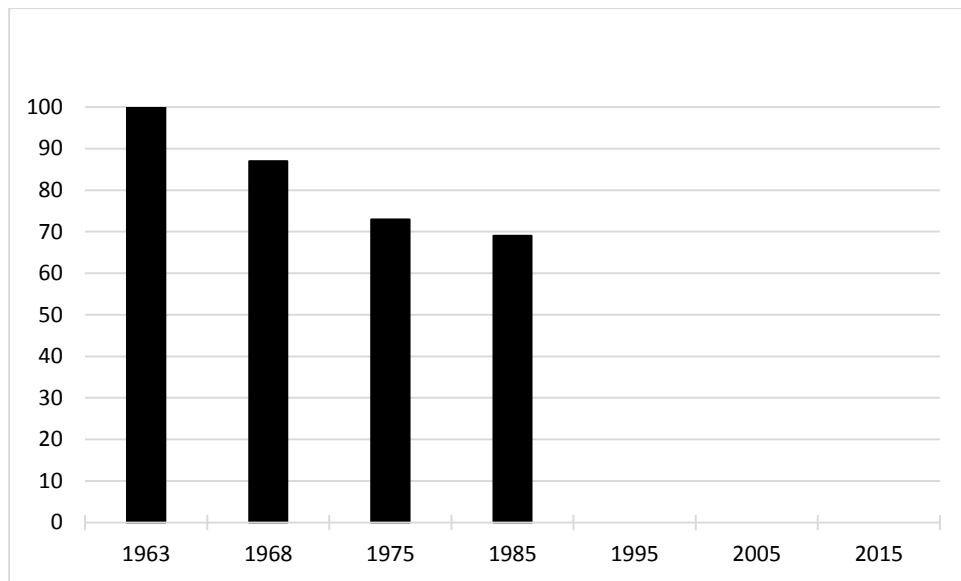
The period is notable for the emergence of Bruce Gordon as a future regional television mogul. The reclusive, Bermuda-based Gordon started his working life as a magician which, it might be said, was a fitting career choice for someone who would later be concerned with the sorcery of television. Gordon later secured a job in program sales at Desilu Studios (which had been founded by actress Lucille Ball and her husband, Desi Arnaz) with the help of Kerry Packer and Bruce Gyngell (Westfield 2000, p. 39). In 1979, Gordon’s Oberon Broadcasters Pty Ltd acquired Television Wollongong Transmissions Ltd (WIN) from News Ltd’s Media Securities Ltd subsidiary (TWT 1979, p. 4). The transaction was prompted by News Ltd’s acquisition of TEN-10 Sydney which required Murdoch to dispose of the Wollongong station (Herd 2012, p. 154). Gordon acquired an interest in Rockhampton Television Ltd (RTQ) through the privately-held Capricornia Television Corporation Pty Ltd (ABT 1985, p. 108)

in 1985 and would acquire outright control in 1988. These acquisitions would form the basis of WIN Television which would emerge as one of the three dominant regional networks in the early 1990s.

The era also saw the beginning of Paul Ramsay's rise as a major force in the industry. In May 1985, Paul Ramsay Holdings Pty Ltd acquired Riverina and North East Victoria TV Ltd (RVN/AMV) through its Paul Ramsay Communications Pty Ltd subsidiary (ABT 1988a, p. 5). Ramsay-controlled companies would later be reconfigured as Ramcorp Ltd, which also acquired the CBN-8 Central Tablelands/CWN-6 Central Western Slopes and NEN-9 Upper Namoi/ECN-8 Manning River licences. These stations would, in turn, provide the building blocks of the Prime Television network.

By the end of 1985, there were 35 regional licences which were ultimately controlled by 26 entities. These included 10 ownership groups which each controlled two licences and one ownership group which controlled three licences (see Appendix G). In 10 years, the independence quotient had fallen slightly to 69 per cent, down from 73 per cent in 1975 (see Figure C).

Figure C: Independence Quotient, 1963-1985



Source: see Appendices B, D, F & G.

The rise of the speculative entrepreneur during the late 1970s and early 1980s was triggered by proposed changes to media ownership rules by the Fraser and Hawke governments. The corporate ambitions which underpinned the emergence of these would-be regional television moguls would be a prelude to the most significant period of destabilisation in the history of the sector during the late 1980s and early 1990s.

Political Directives

It is not acceptable to argue that existing regional licensees should be given a permanent monopoly of services in their areas (Michael Duffy, Minister for Communications, quoted in Earl 1985, p. 3).

The political directives of the Hawke and Keating Labor governments (often at the behest of metropolitan media “mates”) caused major disruption to ownership and control structures during the late 1980s and early 1990s. Given (1995, pp. 15-32) colourfully attributes this shake-up to the interception of four dominant forces, namely “bucks, blokes, bureaucrats and the bird”. The period would begin with efforts to resolve the question of further expansion of television to regional Australia, followed by an attempt to address a structural imbalance in ownership and control. It would end with a restructure which facilitated national networking. Herd (2012 p. 209) argues that while all policy is aimed at balancing the interests of as many parties as possible, the events of the mid-1980s represent particularly partisan interference: “It is hard to think of other instances where the power of the State has been used so blatantly to favour one set of business interests over another”.

The need for change was stirred by the launch of the first domestic communications satellite in the mid-1980s. The “bird” offered the capacity to reach those in the remotest parts of the country who were still without television services and promised a means by which to distribute programming on a truly national basis. The use of satellite technology was first considered by the government in 1961 when the PMG’s Department issued its first satellite study (Reinecke 1988, p. 196). In the late 1970s, a Satellite Task Force concluded that, although all technical problems associated with launching a satellite had been solved, it was “not possible at this time to establish a quantitative case to justify the provision of a national satellite system” (Moyal 1984, p. 338).

Kerry Packer argued that “television services should be provided to areas not at present served and that all four Australian networks should reach all the nations citizens” (ABT 1984a, p. 47). Whilst the discourse may have centred on bringing the bush and the city closer, Packer’s motivation was fundamentally commercial in nature (Herd 2012, p. 174). Packer’s intervention elevated the issue of the satellite to a political level and ensured that its use for the distribution of television programs was the “supervening social necessity” for its introduction (Winston 1998, p. 13).

The satellite was just one of several changes to impact on broadcasting. In 1980, Communications Minister Tony Staley ordered the ABT to conduct an inquiry into subscription television services for Australia. Intriguingly, the seeds of subscription television in Australia were sown at MTN-9 Murrumbidgee Irrigation Areas in the early 1970s when station manager Ray Gamble persuaded his new boss, John Elliott, to investigate its possible applications (Westfield 2000, p. 23). During 1982, both the ABT and Davidson Report recommended its introduction, however a change of government in 1983 would put an end to the enthusiasm for another decade (ABT 1982; CITSA, 1982) (see p. 87).

In October 1980, the government also proposed to offer regional television and radio services the opportunity to apply for supplementary licences (ABT 1984a, p. 51). Bonney & Wilson (1983, p. 88) explain that “[o]n the face of it, such a proposal would appear highly attractive to regional operators, allowing them to expand their television operations and still enjoy a monopoly”. The proposal met with considerable opposition from the country stations which feared that extra licences coupled with the launch of a domestic satellite would make them more dependent than ever on the Sydney and Melbourne stations for the supply of programs. The enabling legislation for supplementary television licences passed through Parliament in December 1982 however the Coalition lost

government in March 1983 before it was proclaimed as law (ABT 1984a, p. 51).

The incoming Hawke Labor government had two agendas in media policy. The first was to prevent a repeat of the conflicts of the Whitlam years through establishing favourable relations between government and media, most notably with Kerry Packer and Rupert Murdoch. The second emerged from an attempt to reconcile the party's own policies against a reform agenda and commitment to purchase a satellite which had been inherited from the previous government (Davis 1990, pp. 356-7).

On 15 November 1983, the new Minister for Communications, Michael Duffy, announced the government would continue with both the domestic satellite and supplementary licence schemes which it had inherited from the previous government (ABT 1984b, p. 235). On 29 November he instructed the ABT to examine the implications of these policies in relation to ownership and localism. In its July 1984 report (pp. 84-85), the ABT found the two-station rule hindered the growth of regional television groups which could act as program originators in competition with the metropolitan stations. While the ABT did not condemn networking, it did suggest the existing structural imbalance would be enhanced by the introduction of a domestic satellite unless the government addressed the issue

beforehand (ABT 1984a, p. 87; 165). Its preferred solution – the “Federal Networking Consortium” concept – was to consider breaking up the metropolitan ownership groups so that no person could own more than one metropolitan station (ABT 1984a, pp. 169-76). By this preferred solution the ABT was asking the government to undermine the accumulated power of the major, established media groups (Herd 2012, p. 184).

The ABT report also considered two options for the provision of television to remote Australia. The first was for a direct, three-channel service provided by the national networks. The second, which came from the RTA, Department of Communications and the state governments, was for four regionally-based services each consisting of one channel (ABT 1984a, pp. 86-90).

On 10 October 1984, the government endorsed the “regional” solution and directed the ABT to commence the licence application process (ABT 1985a, pp. 97-98; 1985b; 1985c; 1986). On 23 May 1985, the legislation giving effect to the RCTS policy passed through the Parliament. On 3 September 1986 the ABT granted licences for each of the four RCTS zones (DTC 1990, pp. 66-73) (see Appendix H). The Western Zone service commenced operation in 1986. In October 1987 the licensee for the South East Zone service deemed it to be

unviable and surrendered the licence.²¹ The North East and Central Zone services both commenced in 1988 (DTC 1990, p. 62; ACMA 2015).

On 18 February 1985, Minister Duffy announced the main thrust of Labor's television policy would be to equalise services by making available, in the long term, three commercial services to all communities (DOC 1985b, p. 2). In June 1985, the Department of Communications' Forward Directions Unit provided the government with two possible approaches. The first, which was favoured by the metropolitan stations, would involve the aggregation of existing licence areas to create larger markets, as originally proposed by the ABT staff paper. The second, which was seen by regional stations as the lesser of two evils, would involve the introduction of multi-channel services (MCS) and was essentially a re-working of the earlier supplementary licence scheme (DOC 1985a, pp. 12-23). A third approach, offered by Queensland Satellite Television which had applied for the north-east RCTS licence, involved the retransmission of the RCTS signal into each regional market. This would be supplemented by a second channel containing programs not shown on

²¹ The licensee made this decision after other licensees in the South East Zone elected to pursue aggregation and the preferred course to equalisation. The licensee had planned to use its signal to provide a second program feed to consortium members seeking to provide an additional service under the alternative multi-channel service (MCS) approach to equalisation. When it became clear that all approved markets would proceed to equalisation directly via aggregation, members of the consortium immediately became competitors and this potential source of revenue disappeared (DTC 1990, p. 62).

the RCTS and a third, special interest channel devoted to live sport, local programs, education and minority interest (Earl 1985, p. 3).

On 28 August 1985, Duffy announced a study to examine television station ownership rules. In his media release, the Minister stated that “particular” attention would be given to examining the “defects” in the current two-station rule (DOC 1986b, p. 2). In December, the Minister proposed the rule be replaced by one under which no entity could own stations that reached more than 43 per cent of the population. Interestingly, this figure represented the existing reach of Murdoch’s News Ltd and Packer’s and Consolidated Press. The proposal was opposed by Prime Minister Hawke, who controversially proclaimed the penetration level be set at 43 per cent for Packer and Murdoch and 33 per cent for everyone else. What was being contemplated was a massive realignment of power in favour of the two largest media interests in the country. The Prime Minister strenuously argued that Murdoch and Packer’s support was essential for success at the next election (Herd 2012, p. 190-2). Packer’s extraordinary influence on government policy during this period was explained by Duffy:

Packer has power because politicians think it's a good idea to give him what he wants, because it's a good idea to have him on side (quoted in Barry 1993, p. 326).

Hawke's position stemmed from a belief that certainly Packer, and probably Murdoch, were sympathetic to the ALP - that they were, as Hawke told Cabinet, "the only mates we've got in the media" (Hywood 1985, p. 1; see Chadwick 1989). Duffy, aided by Industry Minister John Button, argued the government could not afford to alienate regional media interests and hold onto their seats in rural areas. The matter was referred to a sub-committee of Hawke, Duffy, Button and Treasurer Paul Keating. What followed was a year of stalemate with Duffy on the brink of resignation and Hawke immovable in defence of Packer and Murdoch (Barry 1993, p. 323).

Keating was also sympathetic to the networking ambitions of Kerry Packer and Paul Ramsay. The formation of Australian Television Facilities in the early 1960s had given country stations a program buying advantage that was disproportionate to their size (see p. 48). Packer argued the current arrangement meant he earned nothing from the sale of programs to the regions and also eliminated networking opportunities. This element of the Packer lobbying struck a chord with Keating, who saw an opportunity to break the National Party's hold on the country stations forever. He suggested

delineating large regions embracing at least three stations and forcing each station to align themselves with one of the three networks. This would eventually make every station hostage to the networks, but it could be sold politically by the government as bringing metropolitan viewing to the country (Westfield 2000, p. 37-38).

On 20 May 1986, Duffy announced the government's strategic plan for regional television which would provide three commercial services in most regional areas (equalisation); create larger, more viable markets (aggregation); and prevent the extension of existing regional monopolies (competition) (DOC 1986c, p. 5; 1986d). In August 1986, the government released its indicative plan for the equalisation of regional commercial television. The plan involved the formation of approved markets through combining clusters of existing service areas. The report identified nine potential approved markets; of these, six would proceed to aggregation under the current program while the remaining three were for areas where conditions were not yet appropriate for aggregation (i.e. the market was not yet able to support three services or presented implementation problems such as too many licensees) (DOC 1986c, p. 8).²² The release of the draft indicative plan aggravated regional

²² These markets comprised North Queensland (AM1), South Queensland (AM2), North NSW (AM3), Central NSW (AM4), South NSW & ACT (AM5), Victoria (AM6), Tasmania (potential AM7), South Australia (potential AM8) and Western Australia (potential AM9) (DOC 1986d).

broadcasters who lobbied ALP backbenchers in rural areas. This lobbying clearly had some effect as the Minister reduced the number of approved markets in the current program from six to four (DTC 1988, p. 81; SSCOTE 1987, p. 59 (see Appendix I)).

The indicative plan also allowed for the consolidation of licences under joint ownership within an approved market. This would then permit licensees to acquire a second licence in another area if they desired (DOC 1986c, pp. 12-13). The Minister identified 10 pairs of licences which were eligible for consolidation based on existing ownership groups. This provision was as much a potent symbol of the irreversibility of the pending changes as it was an administrative formality, in which the number of regional commercial television licences was reduced from 38 to 30 (see Appendix J).

The plan did not mandate exclusive program supply arrangements with the metropolitan networks however this would be the inevitable outcome. Metropolitan networks - which had long held dreams of gaining access to the regions - were salivating at the prospect of selling in their programs at a cost of between 7.5 and 40 per cent of gross revenues (DTCE 1996, pp. 49-50). Affiliation would be determined, in varying degrees, by existing or historical relationships, fate and luck of the draw. Telecasters North Queensland Ltd, for example, expected to become the Nine affiliate

for that region since Nine was also Telecasters' largest shareholder. The station would, however, be spectacularly jilted at the last minute (see p. 84).

Meanwhile, the deadlock between Hawke and Duffy over the question of ownership remained unresolved (Barry 1993, p. 324). In late 1986, Paul Keating proposed a 100 per cent audience reach in television (i.e. complete deregulation) and that persons could control one newspaper, radio or television station in any one market. This had the air of being the kind of economic reform the government had been pursuing – deregulation and encouragement of competition – but it was also motivated by political debts and payback (Souter 1991, pp. 175-7). Keating's plan ultimately carried the day, albeit with a modified 60 per cent audience reach rule which was subsequently increased to 75 per cent in 1992 (DTCE 1996, p. 39). The effect was that companies had to choose between being “princes of print, queens of screen or rajahs of radio” (see Herd 2012, p. 194).

In March 1987 the Senate Select Committee on Television Equalisation recommended the government proceed with its plan to abolish the two-station rule in place of a new reach rule. The Committee also found that, although there were risks inherent in the domination of the television broadcasting industry by any business or group, networking was not necessarily undesirable nor would it necessarily interfere with localism (SSCOTE 1987, pp. 154-55). This announcement

heralded a substantial increase in applications to the ABT seeking approval of share transactions and licence transfers (ABT 1987, p. 40). Regional commercial television became a game of “musical chairs” as investors anticipated moves by Gordon, Skase, Parry, Stokes and Ramsay to expand their television kingdoms (see Hely 1987, p. 43; Tiffen 2007, pp. 12-15). In 1985, there had been 35 licences controlled by 23 entities; by late 1988 there were 38 licences controlled by 17 entities (see Appendix K). Thus an outline, still hazy in parts, of the new media ownership pattern had emerged (Archer 1988, p. 27).

The aggregation of regional commercial television markets commenced with Approved Market C (Southern NSW) on 31 March 1989. This was followed by Approved Market A (Queensland) on 31 December 1990 then both Approved Market B (Northern NSW) and Approved Market D (Victoria) on 31 December 1991 (DTC 1989, p 95; 1991, p. 72). In most jurisdictions, Prime or Sunshine became the Seven affiliate, WIN or ENT (“Vic TV”) became the Nine affiliate, while Telecasters North Queensland (“QTV”), Darling Downs TV, or Southern Cross became the Ten affiliate (see Appendix L). On 30 April 1994, the two previously separate licence areas of TVT-6 Hobart (which had been granted in the stage two extension to metropolitan areas in 1958) and TNT-9 North Eastern Tasmania were aggregated, thus converting

the whole of Tasmania to a single, two-operator market (DCA 1994, p. 17).

The process of aggregation was difficult for all concerned. The realignment of regional program schedules with those of the metropolitan stations - usually up to 12 months in advance - represented the most obvious change. In an extreme case of viewer backlash, the program director at TNT-9 North Eastern Tasmania received a death threat and numerous abusive phone calls when the station removed several popular Nine Network programs including *The Midday Show with Ray Martin*, *Days of Our Lives* and *Sale of the Century* from its schedule in late 1993 (Whinnett-Smith 1993, p. 7).

The most extravagant manifestation of the government's policy occurred in Queensland. Telecasters North Queensland (TNQ/FNQ) had expected to become the Nine affiliate for northern Queensland. In return, Nine had demanded 25 per cent of gross revenues. This would have more than trebled the station's programming costs and probably sent it broke. Telecasters refused to sign but retained the expectation that a deal would be done. The station even introduced a new "QTV" ident with the Nine "balls" and had started running promos for network programs, such was its belief that its major shareholder would eventually come to the party.

However, a last-minute upset literally changed the station's fortunes overnight. On 24 December 1990, just days before aggregation was due to commence, Bruce Gordon (WIN/RTQ) acquired Darling Downs TV's Toowoomba-based television assets (DDQ/SDQ). On the same day, Gordon signed a program supply agreement with Nine, which resulted in his RTQ/DDQ stations becoming the Nine affiliate for the whole of regional Queensland. The move threw Telecasters' aggregation plans into disarray. (It also created a major engineering headache for the Toowoomba station, whose control facilities had recently been integrated with those of former owner Darling Downs TV's Coffs Harbour station.) Telecasters' refusal to sign on Packer's terms thus cost it dearly; it was left with no choice but to affiliate with the third-ranked Ten (see Westfield 2000, p. 39).

The post-aggregation environment was one of mixed fortunes for regional stations. In 1989, Paul Ramsay's Ramcorp Ltd failed in its attempt to expand into Queensland when it was unable to secure finance to acquire the SEQ-8 and MVQ-6 licences from Christopher Skases's failed Qintex Ltd; the company found itself on the brink of collapse (Syvret 1990, p. 39) in 1990 but managed to return to profitability.²³ In late 1993, the ambitious Darling Downs TV Ltd,

²³ Qintex Ltd's SEQ-8 and MVQ-6 television assets were subsequently acquired by Gosford Communications Ltd (later Sunshine Broadcasting Network Ltd) in 1992. This consortium was led by former Packer executive Trevor Kennedy and ex-Country Television Services Ltd major shareholder

which at one stage had controlled four regional television licences and radio stations across Europe, and had even attempted to produce an animated version of the *Flipper* children's television series, collapsed with debts of more than \$40 million (Thomas 1993, p. 31).²⁴ Despite protestations from regional operators that aggregation was a final nail in the coffin of the sector, a BCTE analysis of financial performance between 1986 and 1995 found that stations in the four aggregated markets remained profitable though less so in comparison with metropolitan stations and historical performance (BCTE 1996, pp. 73-77; see Table 7).

Table 7: Ratios of EBIT to Tangible Assets 1986-87 & 1994-95

Aggregated Market	Average ratio from 1986-87 to Aggregation (per cent)	Date of Aggregation	Average ratio from Aggregation to 1994-95 (per cent)
AMA Queensland	33	31 Dec 1990	21
AMB Northern NSW	73	31 Dec 1991	17
AMC Southern NSW	37	31 Mar 1989	12
AMD Victoria	26	31 Dec 1991	12

Source: BCTE 1996, p. 77 (derived from ABA data)

Sam Gazal, as well as the Grundy Organisation and others (see Bullock 1992, p. 56). The company was acquired by the Seven Network in 1995 (see Lecky 1995, p. 31).

²⁴ Darling Downs TV Ltd's NRN television assets were subsequently sold to a consortium led by Kerry Stokes, Hungry Jacks' founder Jack Cowin and Telecasters North Queensland Ltd (Lecky 1994, p. 31).

The report also found that earnings had generally remained stable, although they still had not returned to the levels recorded prior to aggregation (BCTE 1996, pp. 62-64). There was a marked drop in earnings-to-tangible assets after 1989-90 (which can be attributed to an increase in assets around the time of aggregation) however EBITA continued to track above the ratio of earnings to total assets across all Australian industries (BCTE 1996, pp. 75-78; see Table 8).

Table 8: Rates of Return & Economy-wide Indicators (%)

Year	Ratio of earnings to tangible assets in commercial TV		Ratio of earnings to total assets all industries	10 year bond rate
	Metropolitan	Regional		
1986-87	8.6	28.0	9.6	12.8
1987-88	14.7	31.6	10.4	12.0
1988-89	8.4	33.2	11.3	13.5
1989-90	9.3	37.8	10.2	13.4
1990-91	2.1	14.5	7.4	11.2
1991-92	27.5	12.1	6.0	8.9
1992-93	24.6	12.4	7.3	7.4
1993-94	30.8	14.3	8.0	9.7
1994-95	31.0	15.3	N/A	9.2

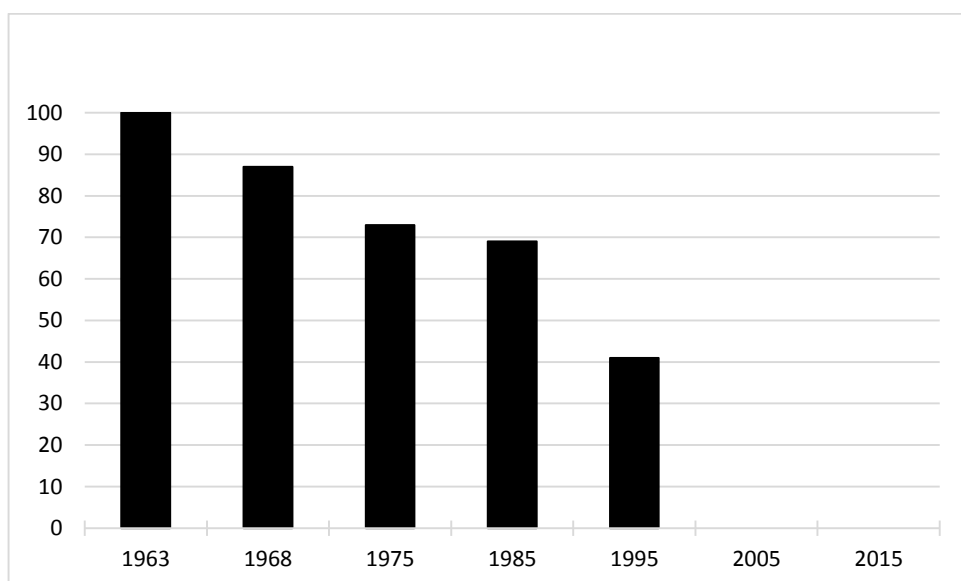
N/A Not available

- a. Earnings are defined as the earnings before interest and tax (EBIT)
- b. All data are at the end of the period, i.e. the 1986-87 value is for 30 June 1987

Source: BCTE 1996, p. 78 (derived from ABA and ABS data)

By the end of 1995, there were 29 regional commercial television licences controlled by 12 ownership groups.²⁵ These included two groups with two licences, two groups – including Paul Ramsay’s Prime Television and Southern Cross Broadcasting – each with three licences, one group – Kerry Stokes’ Golden West Network – with four licences, and two groups – Bruce Gordon’s WIN Television and Telecasters Australia Ltd – each with five licences (see Appendix M). Seven and Nine had also each acquired direct control of a regional licence for the first time. The independence quotient had fallen to 41 percent, down from 69 per cent in 1985 when 35 licences had been controlled by 24 entities (see Figure D).

Figure D: Independence Quotient, 1963-1995



Source: see Appendices B, D, F, G & M.

²⁵ This revised figure includes the TVT Tasmania (formerly TVT Hobart) licence and also takes account of the consolidation of licences for aggregation and the elimination of the GSW Southern Agricultural licence after its conversion to a translator station for BTW Bunbury (now SSW South West) in 1990 (see ABT 1990, p. 38).

The post-aggregation environment had also created the conditions for the last major pieces of the Prime and Southern Cross networks to fall into place. In 1996, Paul Ramsay's Ramcorp Ltd acquired Golden West Network Ltd (SSW, VEW, GTW and WAW), while Southern Cross took control of Telecasters Australia Ltd's regional stations (TNQ, ITQ, QQQ and NRN) in 2001.

The combination of satellite, aggregation and ownership rule changes had ushered in a new era in regional commercial television. Whilst the government's equalisation policy had delivered on its objective to provide more choice to viewers, it had failed to address the structural imbalance identified by the ABT. Instead, the government's policies had added to that imbalance through the destruction of the regional monopolies and the establishment of three national networks centred on Sydney and Melbourne (Herd 2012, p. 268). Australia's regional commercial television stations would return to profitability by the mid-1990s (ABA 2001) however the destruction of long-held monopolies under the direction of the Hawke-Keating Labor governments at the behest of their powerful media "mates" meant the tenuous independence of regional television interests had finally been subordinated to that of the capital city stations.

Chapter 4: Digital Protections and Technical Disruptions

This chapter examines the digital protections provided to existing operators during the late 1990s and early 2000s. These include: (a) the government's decision to abandon plans for increased competition from 1997; (b) the restrictions on subscription television services; (c) the granting of supplementary licences to incumbent operators in remote areas; and (d) the introduction of digital television systems.

It also considers the technical disruptions which occurred during the late 2000s and early 2010s. These include: (a) the increasing consumer preference for alternative delivery platforms such as streamed video on demand (SVOD) and social media, and (b) plans by metropolitan media to use these technologies to bypass regional stations altogether.

Digital Protections

Australia's transition to [digital television] is revealing its origins as an initiative of incumbent broadcasters, politically shaped to accommodate existing industrial interests (Given 2006, p. 3).

The late 1990s and early 2000s witnessed the introduction of subscription TV, the expansion of second and third commercial television services to the remotest parts of Australia, and the introduction of digital terrestrial television. The impetus for further broadcasting reform was derived from the recognition of regulatory failure and the need to deal with technological change (Herd 2012, p. 269). The crucial changes for the commercial television sector included plans to lift the moratorium on subscription television from late 1992, the introduction of new commercial services from 1997, a form of self-regulation in program matters and the extension of licence periods from three years to five with an automatic presumption of renewal (Herd 2012, p. 276-276).

Some of these changes were welcomed but the prospect of competition was not. The metropolitan stations might have found it harder to get their message through had Paul Keating not succeeded Bob Hawke as

Prime Minister in December 1991 and dumped Duffy in favour of Graham Richardson. Richardson was close to Kerry Packer, and showed himself to be very responsive to the arguments put to him by the masters of commercial television (Burton 1991, p. 5). Plans to increase open competition from 1997 were cauterised, with the new Minister for Communications arguing “I just want to give the industry a little bit of time to recover before it takes on new players” (see Peake 1992, p. 5).

The BSA 1992 had also passed through the Parliament at the end of that year. It established a new regulatory framework for broadcasting and a series of rules which enhanced the stability of the broadcast-station market and the incumbency of existing operators by postponing the threat of new entrants. It would thus appear that a sympathetic Minister had enabled commercial television interests to simultaneously retain a degree of self-regulation, stave off competition, and further entrench their dominant position (Herd 2012, p. 277).

The period opened with the extension of subscription television services to regional areas. Its launch had been mooted as far back as 1980 but had failed to gain traction (see p. 69). Subscription television services commenced in metropolitan areas in the mid-1990s using several different delivery systems. Australis/Galaxy commenced

satellite and multi-point distribution system (MDS) microwave services in February 1995, Optus commenced its cable service in September of that year, then Foxtel commenced its cable service one month later (BTCE 1996, p. 5). Regional services were subsequently introduced by United International Holdings' Austar (which had been contracted to sell channels provided by Australis Media) and Century, a minor second player (Westfield 2000). By 1997, Austar had signed up 180,000 regional subscribers which amounted to a 15 per cent penetration rate (Brewster 1997, p. 40).

The uptake of subscription television was particularly high in regional areas with less than three commercial television services (Brewster 1997, p. 40). Around this time, the government announced it would allocate a second, supplementary licence in all remaining solus operator markets across Australia. The granting of these licences would be subject to section 72 of the BSA 1992, under which an existing solus operator would be permitted to operate a second service at the discretion of the Australian Broadcasting Authority (ABA) if no other person was likely to be interested in, and likely to be in a position to operate the second commercial TV licence. The first of these supplementary licences - for Griffith, Mildura, Darwin and remote regional Western Australia - were auctioned in 1995-96, with services commencing in 1997-98 (ABA 1995a; 1995b; 1995c; 1995d; 1996a; 1996b; 1998a, p. 48; 1998b) (see Appendix N).

On 23 December 1998, the ABA announced it would aggregate the licence areas for the existing RCTS services in North East (QQQ) and Central (IMP) Australia thus introducing a second service to each of these zones. On 23 April 2002, the ABA allocated a second supplementary licence to the incumbent operator in each of the Broken Hill, Spencer Gulf, South East SA and Riverland (Loxton/Renmark) areas under section 38a of the BSA 1992 (ABA 2002a). These services commenced operation in 2003-04 (see Appendix 0).

By this stage, planning had also started for a third service in all remaining areas. On 21 November 2002, the ABA allocated a commercial television broadcasting licence under section 38B to Tasmanian Digital Television Pty Ltd, a Southern Cross/WIN joint venture. This service was unique in that it was the first joint venture of its kind in Australia as well as the first commercial television licence to be allocated under section 38B of the BSA 1992 (ABA 2003, p. 29). The introduction of a third service to each of the Broken Hill, Griffith, Mildura, Spencer Gulf, Mount Gambier, Riverland, Geraldton, Kalgoorlie, South West and Southern Agricultural, Darwin, Mount Isa and Remote Central and Eastern Australia areas was completed in the late 2000s. In all cases, these licences were granted under section 38B of the BSA 1992 to joint ventures controlled by the two incumbent operators (ABA 2005a; ACMA 2007, p.

30; ACMA 2009; ACMA 2010a; ACMA 2010b; ACMA 2010c; ACMA 2011, p. 56)
(see Appendix P)

In the meantime, the government had commenced planning for the introduction of digital television to Australia (see Given 2014, pp. 138-140). In March 1998 the Minister for Communications, the Information Economy and the Arts, Senator Richard Alston, announced that Australia would commence digital terrestrial television at the start of 2001, with a simulcast period of analogue and digital until the end of 2008. Regional broadcasters would have until 2004 to commence digital broadcasts (Alston 1998). The Labor opposition and Australian Democrats criticised many of the government's decisions, especially the quotas for high definition programming, the continuing prohibition on more than three commercial services in each market and the complicated restrictions on datacasting services (Given 2014, p. 139). In 2000, a Productivity Commission review found that "[r]apid and certain conversion to digital television is the key to unlocking the spectrum". It recommended setting a firm and final date of 1 January 2009 for analogue switch-off as well as relaxing the existing restrictions on datacasting and multi-channelling (PROCOM 2000, p. 2).

Digital television commenced on 1 January 2001. The original prediction was that implementation could be achieved in eight years;

in practice, it would take until 2013 to achieve full conversion. The uptake of digital television proved to be agonisingly slow. By the end of 2005, only 15 per cent of households with free-to-air (FTA) television had converted from analogue (DCITA 2006, p. 15). The drawn-out implementation and relatively “soft” landing of digital television was due, in part, to a lack of patronage by the existing FTA television operators. Unlike the satellite, for which Kerry Packer had made the distribution of television programs the “supervening social necessity” (see p. 68), incumbent FTA television operators had regarded digital television as simply the next step in the technical evolution of their medium, like black-and-white to colour (Given 2003, p. 141).

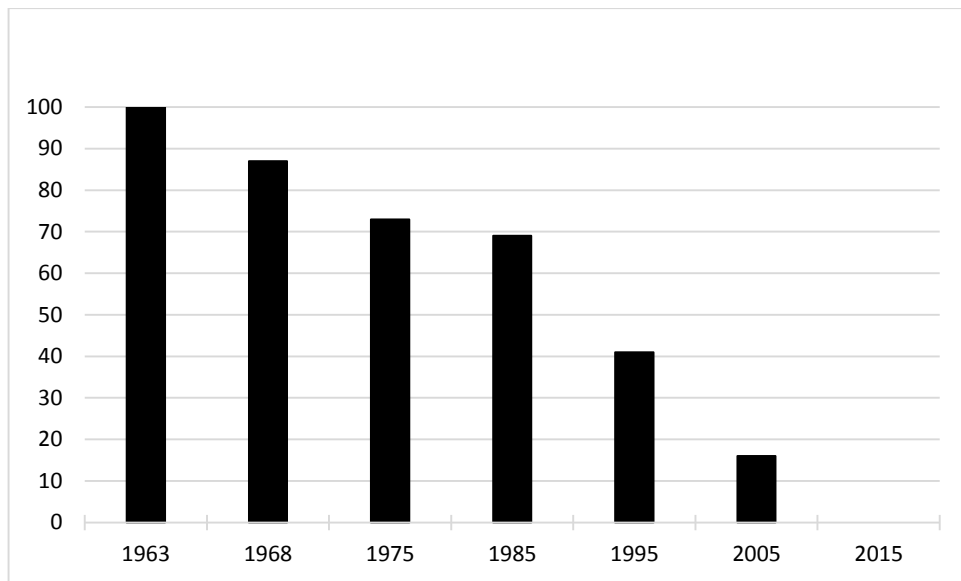
In contrast, the Australian pay TV, telecommunications and internet industries argued that digital transmission represented a technical revolution for television. Furthermore, they accused the FTA television operators of using their apparent complacency as a smokescreen for other ambitions such as multi-channel and/or subscription services and data services to compete more directly with cable and satellite pay TV access to the internet (Given 2000, p. 142-143).

Christensen (2000, xv-xix) draws the distinction between “sustaining” technologies, which typically “improve the performance

of established products ... that mainstream customers in major markets have historically enjoyed”, and “disruptive” technologies, which bring to market “a very different value proposition than had been available previously”. In this context, the initial impact of digital television in Australia was arguably more “sustaining” than “disruptive” in nature as it did nothing more than “recreate the analogue environment” thus many of digital televisions benefits were not realised (Bosland 2007, p. 323). Given (2002, p. 1) argues that digital television was, therefore, a political tool successfully employed by the commercial broadcasters as a means to extend their tenure and block competing uses of the spectrum. In many respects, it sustained the “place of power” occupied by existing commercial television operators by protecting them against “the radical potential of the internet, subscription television and, most of all, the prospects of new entrants to the broadcast-station market” (Given 2002, p. 14).

By 2005, there were 38 regional commercial television licences controlled by six entities (see Appendix Q). These included the dominant Prime, WIN and Southern Cross networks, which controlled the majority of licences between them, as well as Seven, Nine and Imparja. In 10 years, the independence quotient had fallen to 16 percent, down from 41 per cent in 1995 when 29 stations had been controlled by 12 entities (see Figure E).

Figure E: Independence Quotient, 1963-2005



Source: see Appendices B, D, F, G, M & Q.

The introduction of digital television had sustained incumbent operators by increasing their tenure and entrenching their dominant position. The emergence of a new threat would, however, render any newfound sense of security as relatively short-lived.

Technical Disruptions

In five years' time we will just go around regional television and stream our content into those markets. We ultimately won't have a regional affiliate deal (Nine CEO David Gyngell, quoted in White 2014b).

The late 2000s and early 2010s were characterised by a series of technical disruptions which challenged the incumbency – if not the existence – of regional commercial television. These included: (a) the increasing consumer preference for alternative delivery platforms such as streamed video on demand (SVOD) and social media, and (b) plans by metropolitan media to use these technologies to bypass regional stations altogether.

In February 2006 the House of Representatives Standing Committee on Communications, Information Technology and the Arts recommended, amongst other things, that analogue switch-off be extended to 2010 and that multi-channelling by commercial broadcasters be permitted (HORSCITA 2006, p. xix-xxi). In 2008, Australia's free-to-air broadcasters combined to establish the Freeview digital platform in an effort to drive the take-up of digital television (Freeview 2008). The date for analogue switch-off was subsequently reset to the end of 2013, after a phased approach that started in Mildura on

30 June 2010 (see Appendix R). The first digital multi-channel services including 7Two, 7mate, Go!, Gem, One and 11 were rolled out on the Freeview platform for most regional markets starting with Queensland, New South Wales and Victoria between 2009 and 2011 (see Appendix S).

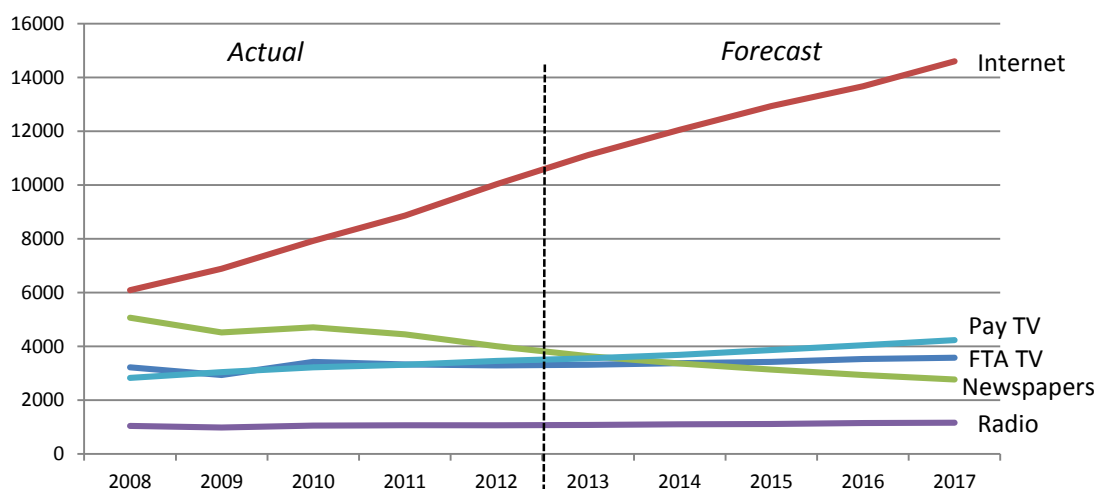
On 5 January 2010, the government also announced it would fund a new digital satellite service – the Viewer Access Satellite Television (VAST) service – to provide digital television to viewers in remote areas of Australia who are unable to receive digital TV through their normal TV antenna due to local interference, terrain or distance from the transmitter in their area. These services commenced operation in 2010–11 (ACMA 2015; see Appendix T).

By mid-2011, viewers in all areas of regional Australia had access to the same number of commercial channels as their metropolitan counterparts. In many respects, the establishment of the VAST service to rectify the last black-spots in FTA transmission was the final stage in binding the country “together as never before by networks of time and space” (Herd 2012, p. 293). But despite this “closing of the loop” as it were in connecting all parts of regional Australia, overseas commentators caution that “[o]ver-estimating change in the television industry is a rookie mistake” (Wiu 2015).

In the words of Erik Barnouw (1990, v): “Not for one moment ... has the subject sat still for its portrait”.

In June 2014, the Department of Communications found that traditional media business models in Australia face increasing pressure from non-traditional platforms. It reported that advertising revenue for the internet was growing (although at a lower rate than in recent years) while revenue for newspapers was declining, commercial radio remained static and television (commercial free-to-air and subscription) was experiencing very modest growth (DOC 2014b) (see Figure F).

Figure F: Total Revenue by Market



Source: DOC 2014b, p. 22.

The report also noted changes in audience behaviour, with a growing preference amongst younger generations for non-traditional media sources such as the internet, social media platforms such as

Facebook and subscription video-on-demand (SVOD) services such as Netflix and YouTube. Furthermore, it found that “consumers are increasingly able to tailor the news content they consume to their tastes and interests while also becoming the ‘generators’ of news reporting and coverage”. In this regard, “the proliferation of online platforms has arguably enhanced the access to, and dissemination of, news content in Australia and overseas” (DOC 2014b, p. 29).

Given et al. (2015, p. 6) cite late 2014 and early 2015 as potentially one of the most decisive moments “for the medium we call television”. Subscription TV operator Foxtel launched its Presto online movie service in March 2014, halved its price by August, brought in Seven West Media as a partner by December, and added television program content in January 2015. Nine Entertainment joined with Fairfax Media in August 2014 to announce their Stan online video joint venture, and launched it on Australia Day 2015. Global operator Netflix commenced services in Australia on 24 March 2015. It seemed that a “new era of a la carte television [had] arrived – seemingly all at once” (Steel 2014). In May 2015, a snapshot of the industry, compiled from interviews with 25 television industry participants, confirmed an “SVOD gold rush” and the significant (and ongoing) rise in the “what-I-want, where-I-

want, when-I-want” consumption of television content” (Given et al. 2015, p. 10, 31).

In the context of this major technological and cultural shift, the debate on the need for further reforms has continued unabated. As far back as 2007, it was recognised that new technology would likely diminish the influence of traditional media moguls and lead to a gradual rethink of the protectionist regime that has characterised broadcasting policy in Australia (Bosland 2007, p. 333). In September 2011, the Gillard Labor government announced it would instigate an independent review of media regulation following an investigation of corruption in the British media (see Leveson 2012). In addition to this inquiry (known as the Finkelstein Review), the government established the Convergence Review Committee to consider the effect of convergence on the Australian media landscape (ACMA 2011).

The findings of the Finkelstein Review and the Convergence Review were presented in the first half of 2012 (CRC 2012; Finkelstein 2012). These inquiries found that media content and communications technologies have outstripped existing media policy frameworks and, as a result, “many elements of the current regulatory regime are outdated or unnecessary and other rules are becoming ineffective”

(CRC 2012, p. 1). Both recommended that the government adopt a new approach to media regulation.

On 12 March 2013, Communications Minister Stephen Conroy announced a package of six Bills which comprised the Broadcasting Legislation Amendment (Convergence Review and Other Measures) Bill 2013; Television Licence Fees Amendment Bill 2013; News Media (Self-regulation) Bill 2013; News Media (Self-regulation) (Consequential Amendments) Bill 2013; Public Interest Media Advocate Bill 2013; and the Broadcasting Legislation Amendment (News Media Diversity) Bill 2013. In his media release, Conroy noted that the government also intended to establish a parliamentary committee to consider the introduction of further reforms including the abolition of the 75 per cent reach rule (Conroy 2013).

On 18 March 2013, the Joint Select Committee on Broadcasting Legislation conducted a public hearing to address its first term of reference: abolition of the 75 per cent reach rule for broadcasters (JSCBL 2013a). In its June report, the Committee found that convergence of the various media was undermining the intended purpose of the existing reach rule and that it should be abolished subject to “there being legislation or legally enforceable undertakings to support local content in regional Australia” (JSCBL 2013b, v).

On 19–20 March 2013, the House of Representatives passed two of the six Bills, namely the non-controversial Convergence Review and Other Measures Bill, and the Television Licence Fees Bill. The remaining four Bills were discharged from the Parliamentary Notice Paper on 21 March 2013 (see Jolly 2013, pp. 21-38). In April 2013 Senator Conroy stated that media reform would no longer be part of the government’s policy to be taken to the next election (Crowe 2013, p. 4).²⁶ Anthony Albanese, who became the Minister following Conroy’s resignation, announced in August 2013 that he saw no urgency for media reform (Tingle 2013, p. 6).

In March 2014, the Abbott Coalition government gave a strong indication that it was sympathetic to relaxing existing media ownership rules (Lynch 2014). However, in August 2014, Communications Minister Malcolm Turnbull conceded that “[c]hanges to media ownership regulations are important”, but stated that “a higher level of consensus” was needed between media owners before the government would consider repealing cross-media ownership rules that are stuck in a “pre 1990s world” (White 2014a). By this time, Prime, WIN, Southern Cross, Imparja and Nine had announced they were in favour of reform. Indeed, Nine would likely be one of the first

²⁶ The government’s ultimately unsuccessful efforts to gain support for its media reform bills was arguably due, at least in part, to ongoing instability within the Gillard ministry.

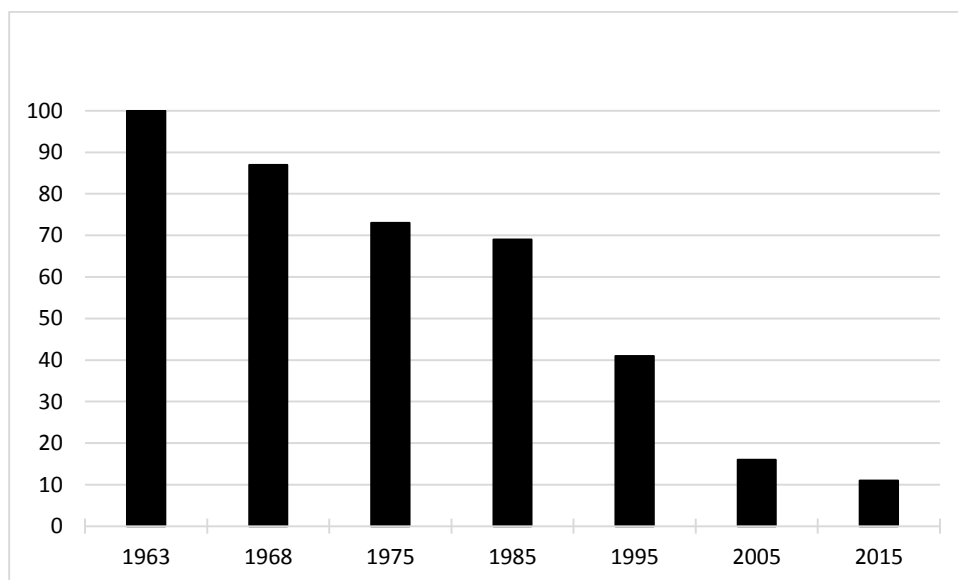
to take advantage of any change to current rules; in 2013 the company announced it was in talks with Southern Cross about a possible merger (Chessell 2013; Knight 2013; Carter 2015). This manoeuvre was arguably as much an attempt to move the media ownership debate as it was to bring the two organisations together. The Fairfax Media group, which has been suggested as a possible buyer for Nine, has also indicated it would support a lifting of current restrictions (Davidson 2014; White 2015). Seven, Ten and Rupert Murdoch's News Ltd have expressed their opposition to any change (Heffernan & White 2014; Mason 2015).

In October 2014, representatives from the three dominant regional networks attended the National Party conference in Canberra to lobby for media ownership laws to be relaxed (Heffernan 2014). In many respects, the approach has echoes of the patronage provided by the Country Party in the birth of regional commercial television. Ironically, regional stations are now asking the National Party to support reforms which would likely lead to its death as an independent sector.

In November 2014, the tenuous existence of the regional networks was spelled out in stark terms by Nine Network CEO David Gyngell, who threatened to stream content direct to the regions and bypass existing affiliates altogether (White 2014b). The statement is

especially potent when considered within the broader context of Australian television history. David’s father, Bruce Gyngell, had the honour of being the first person to appear on Australian television, with the opening of Packer’s TCN-9 Sydney in 1956. Gyngell senior also served as a loyal lieutenant to both Packer senior and Packer junior in various capacities from the 1950s until the 1990s (see Stone 2014, p. 199). In many respects, Gyngell junior’s death knock at the door of regional television might be regarded as the final act in a struggle that began more than half a century ago.²⁷

Figure G: Independence Quotient, 1963-2015



Source: see Appendices B, D, F, G, M, Q & U.

²⁷ “Death knock” is a journalistic term which refers to the practice of approaching the family or friends of someone who has recently died, often in unusual circumstances, for comment or interview.

By late 2015 there were 54 licences controlled by six ownership groups (see Appendix U). The independence quotient had fallen to 11 per cent, down from 16 per cent in the middle of the previous decade (see Figure G).

Gyngell's statement illustrates the potential for the "old order" power of the metropolitan networks to converge with the "new order" threat from SVOD, social media and mobile TV to deliver a final body blow to regional commercial television. It remains to be seen whether the sixtieth anniversary of regional commercial television in 2021 will take the form of a celebration or a wake.

Conclusion

Regional communities in all parts of Australia today have access to the same level of commercial television services as metropolitan areas. But that choice has come at the cost of local, independent ownership which formed the basis of the government's television development policy when services were first extended to regional areas in the early 1960s. In many respects, the current debate around ownership reform is the logical end-point in the interplay between various regulatory, economic, corporate, political and technical influences which began more than half a century ago.

The regulatory frameworks which had been established for Australian radio during the 1920s and 1930s informed the numerous debates on the coming of television during the late 1940s and early 1950s. The 1953 Royal Commission into Television and the Broadcasting and Television Act 1942 provided the basis for the establishment of a dual system in capital cities, commencing with Sydney in 1956.

These regulatory foundations set important precedents for the extension of television to provincial areas in the early 1960s. The decision to grant a single commercial licence in each area created lucrative monopolies primarily controlled by local broadcasting and newspaper interests. The government's policies thus thwarted the

metropolitan stations' plans for a network of relay stations which would have allowed them to distribute their programs on a national basis at low cost. Their immediate response, which revealed the limitations of the PMG's powers and resulted in the "Murdoch deal" of 1963, also established a power dynamic between regional and metropolitan television interests which would continue to play out over the next 60 years.

The economic imperatives associated with establishing and maintaining operations in regional areas, especially in the lead-up to the introduction of colour, resulted in a tendency towards joint ownership and the extensive use of relay during the late 1960s and early 1970s. The increased connectivity between stations, in the form of program delivery and promotional networks, also provided the pathways for development of closer links with metropolitan stations during the late 1970s and early 1980s, and the establishment of large-scale networks and during the late 1980s and early 1990s.

The corporate ambitions of both new and existing interests were instrumental in shaping station ownership and control during the late 1970s and early 1980s. The introduction of colour television sparked a boom in advertising revenue which quickly offset the high capital conversion costs which had been a major impost on stations during the early 1970s. The resultant uplift in profitability, high

rates of return on equity and handsome cash flows gave rise to speculative entrepreneurs. These would-be media moguls – Bruce Gordon, Kerry Stokes, Christopher Skase, Kevin Parry, Sam Gazal and Paul Ramsay – took advantage of the deregulation of financial markets to diversify their business interests to include regional television assets and thus position themselves to be the beneficiaries of proposed changes to media ownership rules.

The political directives of the Fraser and Hawke-Keating governments (often at the behest of powerful metropolitan media “mates” such as Packer and Murdoch) had a major influence on ownership and control during the late 1980s and early 1990s. The arrival of the domestic satellite and the pending introduction of subscription television services presented alternative modes of delivery which challenged the existing business model which underpinned commercial television. The Hawke Labor government’s decision to replace the two-station rule with a reach rule applied a parallel destabilising force to the industry. The resultant increase in stock market interest was fuelled by speculation that Gordon, Stokes, Skase, Parry, Gazal and Ramsay would move to expand their regional television empires.

This period arguably presented a lost opportunity for regional television to retain control of its own destiny. The decision by RTA to finance and originate a range of programs in the lead-up to

colour demonstrated that regional stations had the cooperative capacity to generate their own content. It is possible that, with careful planning and the right political mates, RTA (as a consortium of existing regional stations) could have emerged as a fourth challenger network for non-metropolitan areas. In the event that the government had proceeded to equalisation through the granting of supplementary licences, RTA could then have provided a second - if not third - program stream to all regional stations by relay or via the satellite. Such an arrangement, which would have enabled incumbent operators to program up to three separate channels in each market from local, RTA and metropolitan sources, would arguably have ensured the continuation of a strong, vibrant and independent regional commercial television sector.

The aggregation of regional markets between 1989 and 1992 represented the most significant structural change in the industry's history. The immediate post-aggregation environment of falling profits left several operators struggling to survive. This created the conditions for a further contraction in ownership and control and the eventual emergence of Prime, WIN and Southern Cross as the dominant networks in regional Australia.

The digital protections afforded by government further entrenched the incumbency of existing operators during the late 1990s and early

2000s. The expansion of second and third commercial television services to all remaining areas through supplementary licences and the roll-out of digital television extended the tenure of Prime, WIN and Southern Cross. However, any protection to be derived by free-to-air broadcasters from this situation would appear to be short-lived. The development of alternative delivery platforms and the increased preference by viewers for on-demand streaming services such as Netflix and YouTube has challenged the efficacy of the traditional broadcasting business model during the late 2000s and early 2010s. The threat by Nine's David Gyngell to stream content direct to the regions would, at best, result in a quick-fire sale of country television assets which Gyngell and his counterparts at other metropolitan media companies could then acquire at a bargain basement price; at worst, it threatens to make the regional networks completely redundant.

In early 2014, long-time Prime chairman Paul Ramsay sold out of the network he had established almost 30 years previously (Thompson, et al. 2014). His exit was somewhat prescient, coming 12 months before David Gyngell's ominous warning to regional broadcasters, and six months before his own death (see Thomson 2014).

By mid-2015, Prime, WIN, Southern Cross and Imparja had stepped up their push for changes to the ownership rules with the launch of

their Save our Voices campaign and online petition. In what might be regarded as a Trojan horse manoeuvre from within, the regional broadcasters argue that the BSA 1992 in its current form is an impediment to local media staying local. They say that changing the Act would open up new avenues for their businesses and allow them to protect jobs and continue to deliver the services they currently provide (*Save our Voices 2015*).

The regional networks' claims appear to be somewhat disingenuous given the level of centralisation and job losses that has occurred to date. In light of the threat from Nine's David Gyngell, it is more likely the regionals are motivated by an awareness of their impending demise and a desire to realise the best outcome for their shareholders by talking up the value of their assets (Mason 2015).

In the inaugural Brian Johns Lecture at Macquarie University in September 2015, outgoing ABC Managing Director, Mark Scott, remarked that, given the animosity and competitive egos which linger in the media sector, agreement between executives on a course of action is unlikely in the short term (Scott 2015). In a pointed reference to Kerry Stokes and Rupert Murdoch, Scott also highlighted the considerable political influence which has long been enjoyed by metropolitan media interests over matters of government policy:

When policy reform can be stymied by lunches in New York and dinners in Broome then you know that the cycle of inaction will most likely continue. When it comes to media reforms, it has ever been thus (Scott 2015).

The recent elevation of former Communications Minister Malcolm Turnbull to the office of Prime Minister has led to speculation that media reform will be given a higher policy priority (Davies, 2015). Given the support for change from within, combined with threats from metropolitan media to bypass regional affiliates and the new Prime Minister's desire not to be seen as curtailing to the interests of Rupert Murdoch and Kerry Stokes, it would seem the absolute and irrevocable merging of metropolitan and regional commercial television interests is merely a matter of time.

Appendix A: Stage Three Licence Grants

Call sign	Licence	Licensee
GLV	Latrobe Valley (Traralgon)	Gippsland-Latrobe Valley Telecasters Ltd Granted: 30 May 1961 Commenced: 9 December 1961
BCV	Bendigo	Bendigo & Central Victoria Telecasters Ltd Granted: 30 May 1961 Commenced: 23 December 1961
GMV	Goulburn Valley (Shepparton)	Goulburn-Murray Television Ltd Granted: 30 May 1961 Commenced: 23 December 1961
NBN	Newcastle-Hunter River	Newcastle Broadcasting & Television Ltd Granted: 17 July 1961 Commenced: 4 March 1962
CBN	Central Tablelands (Orange)	Country Television Services Ltd Granted: 17 July 1961 Commenced: 17 March 1962
WIN	Illawarra (Wollongong)	Television Wollongong Transmissions Ltd Granted: 28 June 1961 Commenced: 18 March 1962
BTV	Ballarat	Ballarat & Western Victoria Television Ltd Granted: 30 May 1961 Commenced: 27 April 1962
RTN	Richmond-Tweed Heads (Lismore)	Richmond-Tweed TV Ltd Granted: 23 August 1961 Commenced: 12 May 1962

TNT	North-Eastern Tasmania (Launceston)	Northern Television Ltd Granted: 1 September 1961 Commenced: 26 May 1962
CTC	Canberra	Canberra Television Ltd Granted: 28 June 1961 Commenced: 2 June 1962
DDQ	Darling Downs (Toowoomba)	Darling Downs TV Ltd Granted: 28 June 1961 Commenced: 13 July 1962
TNQ	Townsville	Telecasters North Queensland Ltd Granted: 1 June 1962 Commenced: 1 November 1962
RTQ	Rockhampton	Rockhampton Television Ltd Granted: 8 July 1962 Commenced: 7 September 1963

Source: ABCB 1960b; ACMA 2013 & 2015.

Appendix B: Ownership Groups 1963

Entity	Station
Gippsland-Latrobe Valley Telecasters Ltd	GLV
Bendigo & Central Victoria Telecasters Ltd	BCV
Goulburn-Murray Television Ltd	GMV
Newcastle Broadcasting & Television Corporation Ltd	NBN
Country Television Services Ltd	CBN
Television Wollongong Transmissions Ltd	WIN
Ballarat & Western Victoria Television Ltd	BTV
Richmond-Tweed TV Ltd	RTN
Northern Television Ltd	TNT
Canberra Television Ltd	CTC
Darling Downs TV Ltd	DDQ
Telecasters North Queensland Ltd	TNQ
Rockhampton Television Ltd	RTQ

Source: ABCB 1963b.

Appendix C: Stage Four Licence Grants

Call sign	Licence	Licensee
RVN	South-Western Slopes & Eastern Riverina (Wagga Wagga)	Riverina Television Ltd Granted: 24 October 1963 Commenced: 19 June 1964
AMV	Upper Murray (Albury)	Albury Upper Murray TV Ltd Granted: 1 August 1963 Commenced: 7 September 1964
NRN	Grafton-Kempsey (Coffs Harbour)	Northern Rivers Television Ltd Granted: 24 April 1964 Commenced: 23 January 1965
NEN	Upper Namoi (Tamworth)	Television New England Ltd Granted: 24 October 1962 Commenced: 10 April 1965
WBQ (later SEQ)	Wide Bay (Maryborough)	Wide Bay Burnett TV Ltd Granted: 20 February 1964 Commenced: 10 April 1965
STV	Mildura	Sunraysia Television Ltd Granted: 24 March 1965 Commenced: 27 November 1965
CWN	Central Western Slopes (Dubbo)	Country Television Services Ltd Granted: 14 July 1965 Commenced: 1 December 1965
MTN	Murrumbidgee Irrigation Areas (Griffith)	Murrumbidgee Television Ltd Granted: 1 April 1965 Commenced: 15 December 1965
SDQ	Southern Downs (Warwick)	Darling Downs TV Ltd Granted: 16 June 1965 Commenced: 26 February 1966

SES	South East SA	South East Telecasters Ltd Granted: 1 April 1965 Commenced: 25 March 1966
ECN	Manning River (Taree)	East Coast Television Ltd Granted: 18 August 1965 Commenced: 27 May 1966
FNQ	Cairns	Far Northern Television Ltd Granted: 13 April 1966 Commenced: 7 September 1966
BTW (later SSW)	Bunbury	South Western Telecasters Ltd Granted: 28 February 1967 Commenced: 10 March 1967
MVQ	Mackay	Mackay Television Ltd Granted: 2 August 1968 Commenced: 9 August 1968
BKN	Broken Hill	Broken Hill Television Ltd Granted: 26 March 1968 Commenced: 16 August 1968
GTS	Spencer Gulf (Port Pirie)	Spencer Gulf Telecasters Ltd Granted: 9 January 1968 Commenced: 1 March 1968
GSW	Southern Agricultural (Albany)	South Western Telecasters Ltd Granted: 28 February 1967 Commenced: 23 August 1968

Source: ABCB 1962, 1963a, 1963b, 1965, 1966.

Appendix D: Ownership Groups 1968

Entity	Station
Victorian Broadcasting Network Ltd	GLV
Bendigo & Central Victoria Telecasters Ltd	BCV
Goulburn-Murray Television Ltd	GMV
Newcastle Broadcasting & Television Corp. Ltd	NBN
Country Television Services Ltd	CBN, CWN
Television Wollongong Transmissions Ltd	WIN
Ballarat & Western Victoria Television Ltd	BTV
Richmond-Tweed TV Ltd	RTN
Northern Television Ltd	TNT
Canberra Television Ltd	CTC
Darling Downs TV Ltd	DDQ, SDQ
Telecasters North Queensland Ltd	TNQ
Rockhampton Television Ltd	RTQ
Riverina Television Ltd	RVN
Albury-Upper Murray TV Ltd	AMV
Northern Rivers Television Ltd	NRN
Television New England Ltd	NEN
Wide Bay-Burnett Television Ltd	WBQ
Sunraysia Television Ltd	STV
Murrumbidgee Television Ltd	MTN
South East Telecasters Ltd	SES
East Coast Television Ltd	ECN
Far Northern Television Ltd	FNQ
South Western Telecasters Ltd	BTW, GSW
Mackay Television Ltd	MVQ
Broken Hill Television Ltd	BKN
Spencer Gulf Telecasters Ltd	GTS

Source: ABCB 1968.

Appendix E: Stage Six Licence Grants

Call sign	Licence	Licensee
VEW	Kalgoorlie	Mid-Western Television Pty Ltd Granted: 30 May 1971 Commenced: 9 December 1971
ITQ	Mount Isa	Mount Isa Television Pty Ltd Granted: 21 June 1971 Commenced: 11 September 1971
NTD	Darwin	Territory Television Pty Ltd Granted: 1 November 1971 Commenced: 11 November 1971
RTS	Loxton/Renmark	Riverland Television Ltd Granted: 22 November 1976 Commenced: 26 November 1976
GTW	Geraldton	Geraldton Telecasters Pty Ltd Granted: 21 September 1976 Commenced: 21 January 1977

Source: ABCB 1970, 1975a, 1975b, 1975c.

Appendix F: Ownership Groups 1975

Entity	Station
Victorian Broadcasting Network Ltd	GLV, BCV
Goulburn-Murray Television Ltd	GMV
Newcastle Broadcasting & Television Corp. Ltd	NBN
Country Television Services Ltd	CBN, CWN
Television Wollongong Transmissions Ltd	WIN
Ballarat & Western Victoria Television Ltd	BTV
Northern Television Ltd	TNT
Canberra Television Ltd	CTC
Darling Downs TV Ltd	DDQ, SDQ
Telecasters North Queensland Ltd	TNQ, FNQ
Rockhampton Television Ltd	RTQ
Riverina Television Ltd	RVN, AMV
Northern Rivers Television Ltd	NRN, RTN
Television New England Ltd	NEN, ECN
Wide Bay-Burnett Television Ltd	SEQ
Sunraysia Television Ltd	STV
Murrumbidgee Television Ltd	MTN
South East Telecasters Ltd	SES
South Western Telecasters Ltd	BTW, GSW
Mackay Television Ltd	MVQ
Spencer Gulf Telecasters Ltd	GTS, BKN
Mid-Western Television Pty Ltd	VEW
Territory Television Pty Ltd	NTD
Mount Isa Television Pty Ltd	ITQ

Source: ABCB 1977.

Appendix G: Ownership Groups 1985

Entity	Station
Victorian Broadcasting Network (1983) Ltd	GLV, BCV
Associated Broadcasting Services Ltd	GMV, BTV
NBN Ltd	NBN
Country Television Services Ltd	CBN, CWN
TWT Ltd	WIN
ENT Ltd	TNT
Canberra Television Ltd	CTC
Darling Downs TV Ltd	DDQ, SDQ
Telecasters North Queensland Ltd	TNQ, FNQ
Rockhampton Television Ltd	RTQ
Riverina Television Ltd	RVN, AMV
Northern Star Holdings Ltd	NRN, RTN
Television New England Ltd	NEN, ECN
Wide Bay-Burnett Television Ltd	SEQ
Sunraysia Television Ltd	STV
Murrumbidgee Television Ltd	MTN
South East Telecasters Ltd	SES, RTS
Golden West Network Ltd	BTW, GSW, VEW
Mackay Television Ltd	MVQ
Spencer Gulf Telecasters Ltd	GTS, BKN
Territory Television Pty Ltd	NTD
Mount Isa Television Pty Ltd	ITQ
Geraldton Telecasters Pty Ltd	GTW

Source: DOC 1985d.

Appendix H: RCTS Licence Grants

Call sign	Licence	Licensee
WAW	Western Australia Zone	Golden West Satellite Communications Pty Ltd (Golden West Network Ltd) Granted: 3 September 1986 Effective: 30 September 1986 Commenced: 18 October 1986
IMP	Central Australia Zone	Imparja Television Pty Ltd (Central Australian Aboriginal Media Association) Granted: 3 September 1986 Effective: 1 January 1988 Commenced: 17 January 1988
QQQ	North Eastern Australia Zone ²⁸	Queensland Satellite Television ²⁹ (Telecasters North Queensland Ltd) Granted: 3 September 1986 Effective: 30 June 1987 Commenced: 29 April 1988
N/A	South Eastern Australia Zone ³⁰	Satellite South East Pty Ltd Granted: 3 September 1986 Effective: 30 June 1987

Source: ABT 1984a, 1984b, 1985a, 1985b, 1985c, 1986; ACMA 2013, 2015.

²⁸ On 1 January 1988 the North Eastern Australia service area was extended to include South Eastern Australia.

²⁹ This consortium, at the time of its formation, comprised the licensee companies of ITQ, MVQ, BTQ, DDQ/SDQ, TNQ/FNQ, RTQ and SEQ (QST 1984, p. 2). By the time of its commencement in 1988, the service was a wholly-owned subsidiary of Telecasters North Queensland Ltd (TNQ/FNQ).

³⁰ Satellite South East Pty Ltd comprised the licensee companies for BTV/GMV, CTC, CBN/CWN, MTN, TNT, NBN, NRN/RTN, RMV/AMV, GLV/BCV, STV, NEN/ECN and WIN (DOC 1986b, p. 197).

Appendix I: Approved Markets 1987

Approved Market A: Regional Queensland

Local Area Market	Former Service Area
Far North Queensland	FNQ Cairns
North Queensland	TNQ Townsville
Central Coast & Whitsundays	MVQ Mackay
Capricornia	RTQ Rockhampton
Wide Bay	SEQ Wide Bay
Sunshine Coast	SEQ Wide Bay
Darling Downs/Southern Downs	DDQ Darling Downs SDQ Southern Downs

Approved Market B: Northern NSW

Local Area Market	Former Service Area
Richmond-Tweed Heads	RTN Lismore
Northern Rivers & Mid-North Coast	NRN Grafton/Kempsey
North West Slopes & Plains	NEN Upper Namoi ECN Manning River
Hunter	NBN Newcastle-Hunter

Approved Market C: Southern NSW & ACT

Local Area Market	Former Service Area
Central Tablelands & Central Western Slopes	CBN Central Tablelands CWN Central Western Slopes
ACT & Southern Highlands	CTC Canberra
South-Western Slopes & Eastern Riverina	RVN South Western Slopes & Eastern Riverina
Illawarra & South Coast	WIN Illawarra

Approved Market D: Regional Victoria

Local Area Market	Former Service Area
Goulburn Valley & Upper Murray	GMV Goulburn Valley AMV Upper Murray
North Central Victoria	BCV Bendigo
South West Victoria	BTV Ballarat
Gippsland	GLV Latrobe Valley

Source: DOC 1986c, 1986d.

Approved Market C: Southern NSW

10 January 1989:

- CBN Central Tablelands CBN Southern NSW
- CWN Central Western Slopes
- RVN South Western Slopes

The following licences were also reconfigured:

CTC Canberra	CTC Southern NSW
WIN Illawarra	WIN Southern NSW

Approved Market D: Regional Victoria

10 January 1989:

BTV Ballarat	VTV Regional Victoria
GMV Goulburn Valley	

The AMV Upper Murray licence was reconfigured as AMV Regional Victoria.

Significantly, the common holder of GLV Latrobe Valley and BCV Bendigo chose not to consolidate these licences, which were reconfigured as GLV Eastern Victoria and BCV Western Victoria respectively.

Source: ABA, DTC annual reports.

Appendix K: Ownership Groups 1988

Ownership Group	Station
Ramcorp Ltd (Paul Ramsay)	CBN, CWN, NEN, ECN, RVN, AMV
Golden West Network Ltd (Kerry Stokes)	BTW, GSW, VEW, GTW, WAW
Darling Downs TV Ltd	DDQ, SDQ, NRN, RTN
Telecasters North Queensland Ltd	TNQ, FNQ, QQQ
Tricom Corporation Ltd	GLV, BCV, TNT
ENT Ltd ³¹	GMV, BTV
TWT Holdings Pty Ltd (Bruce Gordon)	WIN, RTQ
Universal Telecasters Ltd (Christopher Skase)	SEQ, MVQ
South East Telecasters Ltd	SES, RTS
Spencer Gulf Telecasters Ltd	GTS, BKN
NBN Ltd	NBN
Northern Star Holdings Ltd	CTC
Quoiba Ltd (Linter Group)	MTN
Sunraysia Television Ltd (Eva Presser)	STV
Territory Television Pty Ltd (Consolidated Press Holdings Ltd; Kerry Packer)	NTD
Mount Isa Television Pty Ltd	ITQ
Imparja Television Ltd (Central Australian Aboriginal Media Assoc.)	IMP

Source: DTC 1988.

³¹ ENT Ltd also controlled the TVT-6 Hobart licence however, as noted on p. 32, this station is not included in this study until the aggregation of Tasmania's television markets in 1994.

Appendix L: Network Affiliations 1989-92³²

Approved Market A: Regional Queensland (31 December 1990)	
Seven Network	STQ Regional Queensland Sunshine Broadcasting Ltd
Nine Network	RTQ Regional Queensland WIN Television
Ten Network	TNQ Regional Queensland Telecasters North Queensland Ltd
Approved Market B: Northern NSW (31 December 1991)	
Seven Network	NEN Northern NSW Prime Television (Northern) Pty Ltd
Nine Network	NBN Northern NSW NBN Ltd
Ten Network	NRN Northern NSW Northern Rivers Television Ltd
Approved Market C: Southern NSW (31 March 1989)	
Seven Network	CBN Southern NSW Prime Television Southern Pty Ltd
Nine Network	WIN Southern NSW TWT Holdings Pty Ltd (WIN Television)
Ten Network	CTC Southern NSW Capital Television Pty Ltd

³² This table details the network affiliation and licensee at the time of aggregation in each approved market.

Approved Market D: Regional Victoria (31 December 1991)

Seven Network	AMV Regional Victoria Prime Television Victoria Pty Ltd
Nine Network	VTV Regional Victoria ENT Ltd
Ten Network	GLV Eastern Victoria BCV Western Victoria Southern Cross Broadcasting Ltd

Source: BCTE 1996.

Appendix M: Ownership Groups 1995

Ownership Group	Station
TWT Holdings Pty Ltd (Bruce Gordon)	RTQ, WIN, VTV, TVT, STV
Telecasters Australia Ltd	NRN, TNQ, QQQ, ITQ, CTC
Golden West Network Ltd (Kerry Stokes)	SSW, VEW, GTW, WAW
Ramcorp Ltd (Paul Ramsay)	NEN, CBN, AMV
Tricom Corporation Ltd (Southern Cross Broadcasting)	GLV, BCV, TNT
South East Telecasters Ltd	SES, RTS
Spencer Gulf Telecasters Ltd	GTS, BKN
Seven Network (Operations) Ltd	STQ
NBN Ltd	NBN
Associated Media Investments Pty Ltd	MTN
Territory Television Pty Ltd (Consolidated Press Holdings Ltd; Kerry Packer)	NTD
Imparja Television Ltd	IMP

Source: BCTE 1996.

Appendix N: Supplementary Licences

The following supplementary licences were issued under section 36 of the Broadcasting Services Act 1992:

Call sign	Licence	Licensee
AMN	Griffith/MIA **	WIN Television Griffith Pty Ltd Decision: 1 July 1996 Effective: 18 July 1996 Commenced: 5 October 1997
PTV	Mildura	Prime Television (Victoria) Pty Ltd Decision: 29 October 1996 Effective: 7 January 1997 Commenced: 1 July 1997
TND	Darwin	Telecasters North Queensland Ltd (Regional Television Pty Ltd) Decision: 29 October 1996 Effective: 29 January 1997 Commenced: 27 March 1998
WOW	Remote & Regional WA	WIN Television WA Pty Ltd Decision: 1 April 1998 Effective: 28 May 1998 Commenced: 26 March 1999

** The AMN Griffith licence was granted under section 38A of the Broadcasting Services Act 1992, which relates to the granting of a second supplementary licence to an existing solus operator.

Source: BCTE 1996; ABA 1995a, 1995b, 1995c, 1995d, 1996a, 1996b, 1998a, 1998b; ACMA 2013, 2015.

Appendix 0: Supplementary Licences (s38A)

The following supplementary licences were issued under section 38A of the Broadcasting Services Act 1992:

Call sign	Licence	Licensee
SCN	Broken Hill	Broken Hill Television Pty Ltd (Southern Cross) Decision: 23 April 2002 Commenced: 16 December 2003
SGS	Spencer Gulf (Port Pirie)	Spencer Gulf Telecasters Pty Ltd (Southern Cross) Decision: 23 April 2002 Commenced: 31 December 2003
LRS	Riverland (Loxton/Renmark)	WIN Television Pty Ltd Decision: 23 April 2002 Commenced: 1 January 2004
MGS	South East SA (Mount Gambier)	WIN Television Pty Ltd Decision: 23 April 2002 Commenced: 1 January 2004

Source: ABT 2002a, 2003, 2005b; ACMA 2013, 2015.

Appendix P: Supplementary Licences (s38B)

The following supplementary licences were issued under section 38B of the Broadcasting Services Act 1992:

Call sign	Licence	Licensee
TDT	Tasmania	Tasmania Digital Television Pty Ltd (WIN/Southern Cross JV) Decision: 21 November 2002 Commenced: 22 December 2003
MDV	Mildura	Mildura Digital Television Pty Ltd (Prime/WIN JV) Decision: 27 January 2005 ³³ Commenced: 1 January 2006
DTD	Darwin	Darwin Digital Television Pty Ltd (Nine/Southern Cross JV) Decision: 10 May 2007 Commenced: 28 April 2008
GDW	Geraldton	West Digital Television No. 2 Pty Ltd (Prime/WIN JV) Decision: 11 June 2009 Commenced: 10 June 2010
SDW	South West and Great Southern (Bunbury/Albany)	West Digital Television Pty Ltd (Prime/WIN JV) Decision: 11 June 2009 Commenced: 10 June 2010
VDW	Kalgoorlie	West Digital Television No. 3 Pty Ltd (Prime/WIN JV) Decision: 11 June 2009 Commenced: 10 June 2010

³³ ABA Annual Report 2004-05, p. 16.

WDW	Western Zone	West Digital Television No. 4 Pty Ltd (Prime/WIN JV)
		Decision: 11 June 2009 Commenced: 10 June 2010
BDN	Broken Hill	Broken Hill Television Pty Ltd (Southern Cross)
		Decision: 14 October 2010 Commenced: 31 October 2010
GDS	Spencer Gulf (Port Pirie)	Spencer Gulf Telecasters Pty Ltd (Southern Cross)
		Decision: 14 October 2010 Commenced: 31 October 2010
RDS	Riverland (Loxton/Renmark)	WIN Television SA Pty Ltd
		Decision: 1 December 2010 Commenced: 6 December 2010
SDS	South East SA (Mount Gambier)	WIN Television SA Pty Ltd
		Decision: 1 December 2010 Commenced: 6 December 2010
CDT	Central & Eastern Australia	Central Digital Television Pty Ltd (Imparja/Southern Cross JV)
		Decision: 4 May 2010 Commenced: 2 May 2011
IDQ	Mount Isa	Central Digital Television Pty Ltd
		Decision: 4 May 2010 Commenced: 2 May 2011
MDN	Griffith/MIA	WIN Television Griffith Pty Ltd
		Decision: 16 June 2011 Commenced: 13 January 2012

Source: ABA 2005a; ACMA 2009, 2010a, 2010b, 2010c, 2013, 2015.

Appendix Q: Ownership Groups 2005

Ownership Group	Licences
Prime Media Group Ltd (through subsidiaries)	NEN, CBN, AMV, PTV, SSW, VEW, GTW, WAW
WIN Corporation Pty Ltd (through subsidiaries)	RTQ, WIN, MTN, AMN, VTV, STV, TVT, STV, SES, MGS, RTS, LRS, WOW, TDT**
Southern Cross Broadcasting (through subsidiaries)	TNQ, NRN, CTC, GLV, BCV, BKN, SCN, GTS, SGS, TND, ITQ, QQQ, TDT**
NBN Ltd	NBN
PBL Ltd (through subsidiaries)	NTD
Seven Network Operations Ltd	STQ
Imparja Television Pty Ltd	IMP

** The TDT Tasmania licence was granted to Tasmanian Digital Television Pty Ltd, a WIN/Southern Cross joint venture.

Source: ACMA 2005b.

Appendix R: Digital Switch-Over Dates

Area	Switch-Over Date
Mildura	30 June 2010
Regional South Australia and Broken Hill	15 December 2010
Regional Victoria	5 May 2011
Regional Queensland	6 December 2011
Southern NSW and ACT	6 June 2012
Northern NSW	27 November 2012
Adelaide	2 April 2013
Tasmania	9 April 2013
Perth	16 April 2013
Brisbane	28 May 2013
Regional and Remote WA	25 June 2013
Darwin	30 July 2013
Sydney	3 December 2013
Melbourne	10 December 2013
Remote Central and Eastern Australia	10 December 2013

Source: DOC 2014a, p. 41.

Appendix S: Multi-Channel Regional Launch Dates

ONE

Regional QLD, NSW and Vic
Tasmania

2 July 2009
30 July 2009

ELEVEN

Regional QLD, NSW and Vic

11 January 2011

7Two

Regional QLD, NSW and Vic

23 December 2009

7mate

Regional QLD, NSW and Vic
Darwin & Tasmania

25 September 2010
24 October 2010

Go!

Regional QLD, NSW and Vic

9 August 2009

Gem

Regional QLD, NSW and Vic

26 September 2010

Source: Freeview website, media releases:

<http://www.freeview.com.au/about-us/news-press-releases/?id=3>,

accessed 3 September 2015

Appendix T: Supplementary Licences (s38C)

The following supplementary licences were issued under section 38C of the Broadcasting Services Act 1992:

Call sign	Licence	Licensee
VAN	Northern Australia TV3 (Imparja/Nine)	Eastern Australia Satellite Broadcasters Pty Ltd ³⁴ Decision: 14 March 2010 Commenced: 16 September 2010
VAS	South Eastern Australia TV3 (Imparja/Nine)	Eastern Australia Satellite Broadcasters Pty Ltd Decision: 14 March 2010 Commenced: 16 September 2010
SVW	Western Australia TV3 (Prime/WIN)	WA Satco Pty Ltd ³⁵ Decision: Effective: 1 July 2011 Commenced: 31 July 2011

Source: ACMA 2013, 2015.

³⁴ Eastern Australia Satellite Broadcasters Pty Ltd is a joint venture between Imparja Television Pty Ltd and Regional Television Pty Ltd (a Southern Cross Media Group subsidiary)

³⁵ WA Satco Pty Ltd is a joint venture between WIN Television WA Pty Ltd (a WIN Corporation Pty Ltd subsidiary) and Golden West Network Pty Ltd (a Prime Media Group subsidiary)

Appendix U: Ownership Groups 2015

Overview

Ownership Group		Licences
Prime Media Group Ltd (through subsidiaries)	(through subsidiaries)	NEN, CBN, AMV, PTV, SSW, VEW, GTW, WAW ** MDV, GDW, SDW, VDW, WDW, SVW
WIN Corporation Pty Ltd (through subsidiaries)	(through subsidiaries)	RTQ, WIN, MTN, AMN, MDN, VTV, STV, TVT, STV, SES, MGS, SDS, RTS, LRS, RDS, WOW, ** TDT, MDV, GDW, SDW, VDW, WDW, SVW
Southern Cross Broadcasting (through subsidiaries)		TNQ, NRN, CTC, GLV, BCV, TNT, BKN, SCN, BDN, GTS, SGS, GDS, TND, ITQ, QQQ ** TDT, DTD, IDQ, CDT, VAN, VAS
Nine Entertainment Co. Ltd		NBN, NTD ** DTD
Seven Network Operations Ltd		STQ
Imparja Television Pty Ltd		IMP ** IDQ, CDT, VAN, VAS

** Joint venture with other broadcasters (see following pages).

Prime Media Group Ltd

Licence [Service Licence No.]	Licensee
NEN Northern NSW [95]	Prime Television (Northern) Pty Ltd
CBN Southern NSW [90]	Prime Television (Southern) Pty Ltd
AMV Regional Victoria [103]	Prime Television Victoria Pty Ltd
PTV Mildura/Sunraysia [10089]	Prime Television Mildura Pty Ltd
GTW Geraldton [10418]	Geraldton Telecasters Pty Ltd
SSW South West & Great Southern [10417]	Golden West Network Pty Ltd
VEW Kalgoorlie [10416]	Mid-Western Television Pty Ltd
WAW Western Zone [4747]	Golden West Satellite Communications Pty Ltd

See also:

- MDV Mildura/Sunraysia (WIN joint venture)
- GDW Geraldton (WIN joint venture)
- SDW South West & Great Southern (WIN joint venture)
- WDW Western Zone (WIN joint venture)
- SVW Western Australia (WIN joint venture)

WIN Corporation Pty Ltd

Licence [Service Licence No.]	Licensee
RTQ Regional Queensland [116]	WIN Television Qld Pty Ltd
WIN Southern NSW [99]	WIN Television NSW Pty Ltd
MTN Griffith [10103] AMN Griffith [10104] MDN Griffith [1130146]	WIN Television Griffith Pty Ltd
VTV Victoria [107] STV Mildura [10088]	WIN Television Vic Pty Ltd
TVT Tasmania [132]	WIN Television Tas Pty Ltd
SES South East SA [10330] MGS South East SA [1150799] SDS South East SA [1130144] RTS Riverland [10174] LRS Riverland [1150796] RDS Riverland [1130145]	WIN Television SA Pty Ltd
WOW Remote and Rural WA [10048]	WIN Television WA Pty Ltd

See also:

- MDV Mildura/Sunraysia (Prime joint venture)
- TDT Tasmania (Southern Cross joint venture)
- GDW Geraldton (Prime joint venture)
- SDW South West & Great Southern (Prime joint venture)
- WDW Western Zone (Prime joint venture)
- SVW Western Australia (Prime joint venture)

Southern Cross Media Group Ltd

Licence [Service Licence No.]	Licensee
TNQ Regional Qld [113] QQQ Remote Central & Eastern Australia [4285] ITQ Mount Isa [114]	Regional Television Pty Ltd
NRN Northern NSW [96]	Northern Rivers Television Pty Ltd
CTC Southern NSW [85]	Australian Capital Television Pty Ltd
BCV Western Victoria [104] GLV Eastern Victoria [106]	Southern Cross Communications Pty Ltd
TNT Tasmania [133]	Southern Cross Television (TNT9) Pty Ltd
GTS Spencer Gulf [10234] SGS Spencer Gulf [1150798] GDS Spencer Gulf [1130142]	Spencer Gulf Telecasters Pty Ltd
BKN Broken Hill [10241] SCN Broken Hill [1150797] BDN Broken Hill [1130143]	Broken Hill Television Pty Ltd
TND Darwin [10173]	Regional Television Pty Ltd

See also:

- TDT Tasmania (WIN joint venture)
- DTD Darwin (Nine joint venture)
- IDQ Mount Isa (Imparja joint venture)
- CDT Remote Central & Eastern Australia (Imparja joint venture)
- VAN North Eastern Australia (Imparja joint venture)
- VAS South Eastern Australia (Imparja joint venture)

Seven West Media Ltd

Licence [Service Licence No.]	Licensee
STQ Regional Queensland [115]	Seven Queensland Pty Ltd

Nine Entertainment Co. Ltd

Licence [Service Licence No.]	Licensee
NBN Northern NSW [94]	NBN Ltd
NTD Darwin [10172]	Territory Television Pty Ltd

See also:

- DTD Darwin (Southern Cross joint venture)

Imparja Television Pty Ltd

Licence [Service Licence No.]	Licensee
IMP Remote Central & Eastern Australia [2898]	Imparja Television Pty Ltd

See also:

- IDQ Mount Isa (Southern Cross joint venture)
- CDT Remote Central & Eastern Australia (Southern Cross joint venture)
- VAN North Eastern Australia (Southern Cross joint venture)
- VAS South Eastern Australia (Southern Cross joint venture)

Joint Ventures

Prime/WIN

Licence [Service Licence No.]	Licensee
MDV Mildura/Sunraysia [1150827]	Mildura Digital Television Pty Ltd
GDW Geraldton [1130046]	West Digital Television No. 2 Pty Ltd
SDW South West & Great Southern [1130049]	West Digital Television Pty Ltd
VDW Kalgoorlie [1130048]	West Digital Television No. 3 Pty Ltd
WDW Western Zone [113047]	West Digital Television No. 4 Pty Ltd
SVW Western Australia [1130166]	WA Satco Pty Ltd

WIN/Southern Cross

Licence [Service Licence No.]	Licensee
TDT Tasmania [1150806]	Tasmanian Digital Television Pty Ltd

Southern Cross/Imparja

Licence [Service Licence No.]	Licensee
IDQ Mount Isa [1130051]	Central Digital Television Pty Ltd
CDT Remote Central & Eastern Australia [1130050]	
VAN North Eastern Australia [1130136]	Eastern Australia Satellite Broadcasters Pty Ltd
VAS South Eastern Australia [1130135]	

Nine/Southern Cross

Licence [Service Licence No.]	Licensee
DTD Darwin [1130013]	Darwin Digital Television Pty Ltd

Source: ACMA 2013, 2015.

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