

Public service broadcasting (PSB) regulation in Indonesia: Between market and public interest

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6HQLRU /HFWXUHUR PPSQULFDPWHLQRQ R8 QD & RQHWVDV <R,ODRNDUWD

Abstract: 7KH UHIRUP RI SXEOLF VHUYLFH EURDGFVWLQJ REVWDFOHV LQ FRXQWULHV ZLWK VS. DOLSVWFDJO WUDQV SROLWLFDO FKRIQJGH DWK W/ D UHV, LQYDOHQ HVK D3 6% LQ WZR GHFDGHV ODFNV RI DSSURS. BQQDQHV SFDOLHVLQ \$V (DVWHUQ (XURSH NW RHHJLXO DWKRIU ODFHVLJQ DV ZHOOLPSOHPHQWDWLRQL 7KL VS. SPSHHUV H. D. D. Z. PIXO DWLQJ 36% SDUWLFXODUO\ SD\ V DWWHQWLRQ WR LQG XVWU\ SURFHVV DV D FULWLFDO WRRO WJR DREFMUYHQD ORQJ ODZ UHYLVLRQ SURFHVV LQ , QGRQH S XEOLF DQ FDSWXUH WKHRULHV LQ UHJXODWR RQ RW 66% SDSHU DQ UHJXODWLRQ LV ZHDN WK REVODZLQZ DKRZ PDGH 7I SURYLGHV QHZ DQDO\VLV RQ 36% FHGLD O\$Z WKDW VI LQGSHSHQGHQW DQG QRQ SURILW ERG5, , QGRQHVL DQ 35DGLR RI WKH 5HSXEOLF , QGRQHVL DSXEOLF795, 7HOH , QGRQHVL LV SDJRWLWLLQ \$FV% UFWHG, WQZDV HQD IDYRU RI WZR DFWRUV DXWKRUV W 36% DQVRM KFLDOV ZL PRXWKS LHFH LQ RQH VLGH DQG WKH \$QG XVWU\ JURXS PDUNHW SROLF\ RQ WKH RWKHU

1 Introduction and Research Design

\$V D SXEOLF SROLF\ UHGHV LQJLQJ \$XEOLF W H R Q L F Q W U D FRPSOH[QHJRWLDWLRQ SURFHVVQ LQK QXWQFH QJ EAKSRIC DQG VRFLDO FXOWXUH RI D FRXQWLFDO) R\ V M Q M P W D Q R DXWKRULWDULDQLVP WR OLEHUDDQ \$WU D Q D W I D R G D O H F WKH SURFHVV RI IRUPXODWLQJ QHZWRKHGU E V X D Z W , D F W L LQGLFDWHG E\ FRQWUDGLFWRU\ S R O D F M H R X Q F R I P H V A H W Z +LVWRULFDQO\ IROORZ WKH FKD(QJH RSH S R D W W L F D O V \$VLD ODWH V IURP DXWKRULW DUPIRFO DDQLF FRP P X I Q H [SHULHQFHG VLJQLILFDQW UHJXODW R I G L E D I O R U P I R , Q P O L \ H D U V W K H U H Z D V D W U H Q G H R V K S S Q U R P F W D Q L Q G H S H Q G H Q W S X E O L F V H U Y L F H P H G L D % > S @ R O) X B W K H U I U H V S R Q V H W R H W R K I H Q H F Z H W J H F @ Q R O R J \ > @

¹ &RUUHVS RQGLQJ \$XWKRU PDVGXNL#KRWP DLO FRP

7KH SROLWLFDO UHIRUP ZKLFK ZBUNHG E\ WKH VHC
WULJJHUG PHGLD V\ VWHP UHIRUPHUC ZDGR SXIE\ DF> S@H
UHIRUP 55, DQG 795, DPLGVW UDSLQJ W\ RW ZW XURIYR R\ P\ H U
PHGLD V\ VWHP ZDV DXWKRULW\ DWLQD Q 95Q ZDDW XW B
RZQHG PHGLD DQG PR SXW\ S W H H F H D R M W K H U H J L P H
2QH RI WKH LPSRUWDQW UHJXODWL\ R\ R\ D E F D Q W D U J H U D
ZKLFK UHFRJQL\ Y\ V F B X E\ Q L F D G F D V W H L S O D F B 6% W D Q C
%URDGFVWLQJ \$FW QR 7KHR \$ Q W U K D K L S R W P D W D V
DQG 795, IURP VWDWH WR SXEOLF FARLZQ YGHU HORPSS DQJ FR
VXFK DV *HUPDQ\ D Q F W W K M Q R W W K E H D W X F W X S I O D L I Q C Q
PHFKDQLVP FRQWHQW FULWHULD D Q Q W K H P Z D Q G W W R D W
36% V\ VWHP :K\"

,Q DUWLFOH •5HVHUYLFL\ H L Q J R D E F D F W L Q H Q S O B H Q D Q I R X
RI 36% VWXGLHV QDPHO\ SROLF\ P R Q U D W L M F X W L I R H Q D Q G U S F
UHVHDFK 6LQFH 36% LV GHSHQGH\ D R Q G P I X E K L R I Q W H I
IRFXVHG RQ SROLF\ W\ S H P D L Q O\ L Q F A C H V W H I J X D W R S
VWXG\ RI 36% JRYHUDDQH SROLF\ LQ , QGRQHVLD

7KLV SDSHU H\ D P L Q H V S U R F H V V R I G R D F X O D W L S E J W 36%
DQG SD\ DV D W W H Q W L R Q W R L Q G X W W L P L F D S V S X U R F H W W F L Q
\ H D U V 7KLV VWXG\ S U R S R V H V D V E Q V P D S D D F O W L F W K H R U
LQ WKH %URDGFVWLQJ /DZ UH\ L W R R Q R X V E B P H O I R
%URDGFVWLQJ \$FW DV V W D U W L Q D S R L H Q W H W G R X R B G H R
V W D W X V R I 36% F W D U X H F D V X Q G M X Q G L D B W R V W H P Q G P L R Q J Z
H\ S O D L Q H G L Q W K H V H W Z R S H U L R G V D J H Q G D D Q G H W V
Q H J R W L D W L R Q G H F L V L R Q P D N L Q J S K D V H

7KLV SDSHU DQVZHUV WZR TXHVWLRQV)LUVW KRZ D
DQG WR ZKDW H\ W H Q W L W Z D V I R U P F X Q G H G R L Z D W I G H Z %
H\ L V W L Q J P H G L D L Q G X V W U\ F D S W X Q J \$ F W W K R 36% U H J X L O D
D S U L P D U\ G R F X P H Q W W R D Q D O L] H S F K R D V B D M G F Z L H W K L R Q
E R R N V D Q G R W K H U O L W H U D W X U H V 0\ Z R D X O G F D E W H R U Y H Q V
Z K L O H R W K H U 36% S R O L F\ P R G H O H O S H E F L X O B G U Q U X F R P S

2 Theoretical Frameworks

2.1 PSB Regulatory Governance

36% LV ZLGHQ\ XQGHUVWRRG DV EURD B E D V Y L E J W P H G I S X
WKH SXEOLF \$FFRUGLQJ WR 81(6&2 H U F L H D D U Q R H U V W D W
DQG IUHH RI SROLWLFDO LQWHUIRWHF\ F H > D Q G , S U R L V G\ X W
DERYH FRQGLWLRQ 6PLWK VWDWH G P B W W K H K O B O R R Z L J
OHJLVODWLYH UHJXODWRU\ IUDPHZRUNEIRFOH V V F X Q V
SXEOLF VHUYLFLH EURDGFVWVHUV Q F W H Q D F W G U H F R I U S R D
I L Q D Q F L Q J V W U X F W X U H W K D W H Q V X K U D I Q L H G P L W R U L S Q E
D F F R X Q W D E L O L W H H D Q G O R E W R O F K D Q G F H Q D I Q V G D W L L R D O O
> @

,Q OHJDO VWDWXV PRVW RI 36% U H J X O D W H H G D W L S Q G E
LQ VDIHJXDUGLQJ WKH LQWHUHV\ D Q G R W R X E D W O D O F H S R E
FRPPHUFDO PHGLD% & R D Q G Q \$ S W D Q F H P D Q G H D W W & Q G S B U D
)XUWKHUPRUH WR HQVXUH WKH LPSRUWDQW R\ R P S R K V

\$PVWHUGDP 3URWRFRO RI 7KLV UGH JXOB S/HLRQW DRVHF
MRLQHG WKH 8QLRQ WR FKDQJH W BGLIUR WPH JX OGB%LR @V D
,Q ,QGRQHVL D SROLWLFDO DQG HFIRVQVPHL WVRURLWUM EB
RQH 'HEDWHV RQ 36% SROLF\ RFFXUD W H WQZH ZHQ XEORWKW F
SXEOLF LQWHUHVW E\ ODZ LQ RQH VLGH ZLWK GHVLUH
DQG SROLWLFDO WUDXPD RI DXWK B ULWMD V WUHQ QVWVKPQLQ
EURDGFVWLQJ LQG XVWU\ GHEDWHV RQ 36% OHJDO VV
JRYHUQPHQW LQG XVWU\ DQG FLYL Q RFRPHLW FLD V RURNG DR
ZKLFK FRQWUROOHG E\ PRQRSROLVQL FH QFRPAS RURD WLVWQ
SXEOLF VHUULFH PHGLD SRZSHUR VFRFDHULFLD WLVWRRU
UHJXODWRU\ JRYHUQDQFH

2.2 Public Interest in Broadcasting Sector

1RUPDOO\ WZR LVVXHV IUHTXHQEV VFODDVLVFD D QUG FVX
36% UHJXODWLRQ \$V D SXEOLF GRPDLQ IUHTXHQF\ LV
XVHG E\ DQ\ UDGLR RU 79 FRPSHQVD FVK W LPWK KH H QFDH
QDPH RI SXEOLF DQG LWV OLPLW DWIRRQP D WIR TXHQV FRIVK F
DQG WKH OLFHQVLQJ SURFHVV EDVGHHSQ QFRHPSW WLVWLVX
7KHUH LV D JHQHUDO YLHZ WKDW IURQD H QIRY N B R B Q W
LQG XVWU\ SOD\HUV EXW DOVR IRUWKKHIEHTD XHQW\ RIF
GRFWULQH LV QR ORQJHU YDOLG VWLW Q LVLWHLV HRQL WVK
3SXEOLF LQWHUHVW' UHTXLUPHQW FRFRP D Q GEHR DGRF DAD
SXEOLF LQWHUHVW FRQYHQLHQFH DQG QHFHVVLW\ > @
ORUHRYHU FXOWXU DVOR SLUDRQ H F SDRW RYR P WHOHYLV
RWKHU UHVRQ ZK\ EURDGFVWLQJ LV VWULFWO\ UHJX
HQWHUHG SULYDWH VSKUH RI FYM Q YH S DOV RYHQ WVKHL DZ
DQG WHOHYLVLRQ DUH WZR PDMRU FHOGLD Q WLVWLVW S H B S E
DUH RIWHQ W KH DSRGHG IXVO PHGLD
%DVLFD O O\ WKH WHUP C3XEOLFFGHVU YLLFHC HUX ODKVH R E
DW QDWLRQDO DQG LQWHUQDWL RGHV Q UOHE YHD N3XECO IRF Y
GHHPHG YLWDO IRUVRYHHWPHU H HDU B CSRZV UR I HGSXFOGALIC
VRFLDO JHRJUDSKLFD O RFDWLRQGGRUH UHQ W H S R \$WV IGH
VHUULFHV KDYH EHORQJHG WR WLVWU FDOMLNR WVR DGR PR S
OLQHV YLD KHDOWK FDUH WR HLGXLRQW E B B DGF DZVWIOQ D
OLEHUDO VWDWHV VXFK DV WKH 8GLV Q ULE Q WLVWLVW Q S XERO E
36% SROLF\ LV D IRUP RI VWDWH VSKH O HJ B W @R Q)R R US D
OHJDO VWDWXV VWUXFWXUH VHUWQ GHDDUHVW KDQ SHW W H
GHEDWHV WKDW GRS W H R W W RJS X H O R F % Q D Z H U H V W L Q W

2.3 Capture Theory of Regulation

\$V VWLSXODWHG LQ /DZ QR R O D W Z R Q D R L Q D W H
DFW LQ ,QGRQHVL D LV DQ DEVROX W H RYXWIKRPUHLQW R IIE
+HQFH WKH OHJLVODWRU RU JRYHUQPHQW QLG R S R I O L D \ R E
GRHV QRW HVWDEOLVK D SHUPDQH QVR R WLVWLVW D H O E B G H Q V
D SROLF\ 1HYHUWKHOHV SDUOLDPSHQW UDFR Q V X Q W DCRV
SRZHU LVVXLQJ ODZ GUDIW IRUPDOO H Q W K B X G G SDRPHL D
WKURXJK YDULRXV VWHSV &LYLO VRSFRVHW D DGU D H W O W E
LQVWLWXWLRQV ,Q WKH IRUPXOD VSLRQ DSOJ R F H D V R F S D U

SDUOLDPHQW PHPEHUV WKDW UHS QMWHQWYSHO LRVULFDQOL
LQWHUQDO PHHWLQJV DQG SXEOLF KHDDZULQJV SULRU WR
\$FFRUGLQJ WR %DUELOH DQWQKFN HSSURFWWRVDPDNHQJ
SROLF\ PDNHU IRU ,QGRQHVL DDUDEWPHLQWRLH *RQGH
WR GDPDJH SXEOLFQVWKUHLVWSR,OLP\ RXWFRPH FDSWX
UHJXODWHG SDUW\ > @)RU LQVWDQFHODWH B6%QVRV
EHQHILW RI VRFLHW\ LV FDSWXUHGDQGLQVGHVWUHQDQW
WKHLU ODFN RI NQRZOHGJH RQ WKADENLDDGSFDRVHLQJ VQV
UHJXODWH 36% V\WHP SROLF\ PDNHFK DNTXUHTXVQ
DOORFDWLRQ UHPLW DQG IXQGLQJ UYVWRIP FDSWQ
FRQVWLWXWLRQDO V\WHP LF UHQDFWLRQDO DQGHFKDR
)RU WKL VVXG\R, ZLOO HJQGDYRQDO DQG IXQFWL
)LUVV LQGLYLGXDO IRUP LQFHQWQYHJLVKDSWRGWF
LQGXVWU\ > @ ,Q WKH HOHFWRUDO V\WHP ZLWK KLJK
CSRQLWLFDO EDUWHUC DPRQJ SROLQVLFDO VLDJHDIQDF
GRQRUV RQ WKH RWKHU ,Q WKLV PRGLDQVHQHQBQWFRD
IXQGV WR HQFUHQH LQGHVWVWRWDSRDLVQLFSDRYQGHVW
IRU WKHP LQ RUGHU WR KDYH URPPXWRRPQORH QFKHOS
PDNHUV LQ WKH IXWXUH 6HFRQG DWQHWSDQDQHVWFRQ
ILOWHU LQIRUPDWLRQ HVVHQWLDQ WRSRQDQFRGHFWLVR
PDQLSXODWH SXEOLF RSLQLRQ LQ RRGHUQWRWIDHFSHW
KHDULQJV LQWHQVLYHO\ DFWLYHQURQSRSLQHVQRVHQB
LQYROYHPHQW RI LQGXVWU\ H[SHQDWMQDWWHPSRUDU\ F
,Q WKH ORQJ KLVWRU\ RI PHGLD UHILQGHSRQGHQ
FRPPLVLRQ RI EURDGFVWLQJ DURIUYXIDPSODEWHKBRVFL
LQWHUQHW QHXWUDOLW\ UHJXODWLRQ DSSOLHG E\)HG
6WDWHV LQGHSHQDQWR,GRQDQVLEQWERRRHWVW%UR
\$FW RI WKH GLQFDWPHQW DQGWKQ7\$QWFRIPPXQZFDV
LQIOXHQFHG E\ QDWLRQDO DQG LQWUQDWLRQDO LQMM
SDUWLFXODUO\ WR UHPRYH EDUULHUV IRU IRUHLQJ LQY

3 Debates on Indonesian PSB

,Q WKL VDUW , ZLOO H[SODLQ UHAWXODQGRD VGRFLQJ\$QW
DQG LWV UHODWHG GRFXPHQWV HQHUSDKMVG E\ P\ ILHQJ
WKHUH LV VWURQJ GHEDWHG DSPXQULFRYHQWQPHS
IRUPXODWLQJ WKH \$FW *RYHUQPHQW &QWPHXQHVVDWILHSQ
,QIRUPDWLRQ 7HFQRORJ\ 0&,7 ZKLQHVWWRFTZDWHRI
\$796, UHSUHVHQV LQDQXZKLDHJURDQDQVLYRILFHGHQHVWU
SDUWLHV DFDGHPBQYHU,QLQVQDQVQVHQRJQQRVWLR
DV ,QGRQHVLQ 3UHVV DQG %URDGFVWLWVQW6RFLRQ\ R
PHPEHUV WULHG WR DSIFRPPRGDWHKDDOQOEHQWLQRVFRVLP
LQWHUHVW 7KH WDEOH EHORZ GHVULEHV YDULRXV SUR
RI 36% JRYHUQDQVWUXHJWVQVWVQVQVHVBRHBDHQGIX

Table 1 3URSRVDOV RQ 36% *RYHUQDQFHV

No	Issues	Government	Industry	Public
	/HJDO	WDWXV 6W 0&,7 \$VWDWH XQGHU PLQLV DQG LW HVV	DWVWVWVFRZQGH FRUSRUWVLRQGB WULPQHFILFGRZQ DQGLVWVLEQ	HQFV SXE SURILW VKHG E\

		JRYHUQPHQW	VWDWH RZQ FRUSV	LQ
*RYHUQL	ERDUG RI VX	SHUYLVDUG RI	%RDUG RI VX	SHUYLV
VWUXFW	ERDUG RI	HFFXWLVV	DOGERDUG RI	H[HFXY
	XQGHU 0&,7	HFFXWLVV	DW LQ WKH	HFFXWLVV
	0&,7	SULYDWH	FRUSV	ULQD PHQW
6HUylfH	DUHD &R	RYHUWK/HV	WLVV	H HQWLU
	,QGRQHVL	DURKLDHSD	JRKQWRQ	DUFKLO
	ZLWK SURS	UWERQD	EDFFRPSD	GH E\ ORF
	DOORFDWLR	RFRPHU	VHSXEOLF	VHUylfH
	EHWZHHQ	SXEOLFH	SQOYD	WKH HJL
	DQG FRPPX	QLWHTXH	QF\ DQ	SRUWRQ
	EURDGF	FDVWLQJ	SRUWRQ	RI IUHTXH
)XQGLQ	J6WDWH	EXGJ	HVW	DWLV
VRXUFH	VIHH	VRFLDO	GRQDWR	FLDO G
	FRPPHUF	LDOD	DGWHUL	VN
	DQG RWKHU	DSSUR	SRUHL	DFLD
	LQFRPHV	DGYHUW	LV	DSSURS

6RXUFH > @

\$OO GHEDWHV LQIOXHQFH RYHU WKH WPHDNL QJS S R Q V R R
 \HDUV IURP LWV DJHQGD VHWWSQ W B QCK B U B LP IDOJ H Q D
 WKH SDUOLDPHQW E\ 1RYHPEHU W RI 2 Q K M K H 36% E D M
 FRQWUDGLFWV WR SXEOLF LQWHUHVW)URP DOO DUV
 LQ DUWLFOHV)LUVW DUWLFOH \SHW K D I E V R D G F H W V 36%
 LQ ,QGRQHVL DORQJVLGH SULYDWH FRPPXQLW\ DQG S
 6HFRQG DUWLFOH WKDW H[SODLQ D W W D X G W W X D H W X K I
 GHVFULEHV 36% DV ODZ HQWLW\ B G W B B Q G V I Q H G E H X W D
 IRU FRPPHUF LDO LQWHUHVW DQG DUWLFLXQF W O R Q W R D W W
 55, DQG 795, DUH FKRRVHQ IRU 36% H L Q V D E O H V K E B
 ORFDO 36% RXWVLGH ERWK LQVWLWXWLRQV RQ WKH RW
 7KLUG DUWLFOH H[SODLQV IXQGLQHV R X W D H W D C
 EXGJHW VRFLDO GRQDWRQ DGYHULM LV L R Q Q D H F W H R G
 EURDGF DVWLQJ DQG UROH RI ILQDQFH DFFRXQW DELOLV
 DFFRXQW DQW SXEOLWK G W K H P W G R D D O W W F O H 36% W K D W Q
 WR EURDGF DVW SURJUDPV IURP LQ V H L D Q D W L F R K Q O R F
 EXVLQHV DGYHUWLVLQJ PD[LXP LPXP DQG RRFW B B B G
 GXUDWRQ D GD\
 7KH HQDFWPHQW RI WKHVH DUWLFLYORXUL QGL SDW B V F V
)LUVW DGRSWLRQ RI %%& OLNH PRGH 36% L Q G B Q H Q C H
 DQG 795, IV OHJDO VWDWXV IURP W W B O X I F W R S X B O I O F V H
 VRXUFH RI IXQGLQJ DORQJVLGH VWDWH EXGJHW LV D
 SDUWLFLSDWRQ 7KLUG HVWDEGL EK FSHDQV L D I P H X S V H W L
 IRU IRUPDO SXEOLW DSSURSRUWLVV R Q W F D E O H Z D Q W R K M B S S O
 +RZHYHU SROLF\ RI VHUylfH DUHD LV L V L Q T X D H Q F L D O I O R
 PDUNHW LQWHUHVW \$V GHVFULEHG B E B Y W F R K P H S F F W
 DGYHUWLVLQJ XS WR RI WKH B Q W Z R H J W Y L R H Q D P H G W
 RI WUDQVODWRQ RI %URDGF DVW 36% J X S F W R W K D W F O P
 WR SULYDWH WKDW L W B W L R Q H R I F R P P O G F L O J O V R G V F H W Z
 SRWHQW L D O O \ G L V W X U E V 36% IV V X V W D L Q D E L O L W \ H V S
 I H H D V L G H D O I X Q W D W L R Q S B V R U I O T S R H O V X Q L W G X V I R V G R I S H
 36% FKDQQHOV LQ RUGHU WR ZLGHU SXEOLF VHUylfHV
 %DVHG RQ WKHVH ZHDNQHVVHV , D W J X I R W R H B H 315Q
 795, DV 36% WR UHDFK DXGLHQFH VY D V H F L V R L F R Q S D Q G H F E

HQDFWPHQW RI WKH /DZ 55, XVHV RQFOWD R XWKH URV
SRZHU RI SULDYDWH UDGLR VWDWL R QYL VLLQFVH XMDL O LJH D
RI WKH HQWLUH 79 IUHTXH QFLHVOZ KMLKH DTS55QLRQWDLF
DUWLFOHV RI WKH /DZ ZLOO SODFH H36P/H D V F DP B DQ RIUWSR
ILUPV

)XUWKHUPRUH DV GLVFXVVHG DERXGH HWDEOWKHS ODDQ
36% LQVWLWXWLRQDO GHVLJQ FRPSDGHY MRR S/S G FERLFC
\$FFRUGLQJ WR HLJKW LQGLFDWRURV QVYH D Q S HGD E ARQV L
PRUH DUWLFOHV WR DGRSW WKH URIV WL QLVW D Q FHV DFRU B H
QHHGHG WR H[DFWU GHRLW36% Q F RQWHDQGD QIL QXDQ FHV WK
LQGSHSHQGHFH DV ZHOO DV WKH PHFKDQ RYPMU WRK HI QH
RSHUDWLRQ

4 Captured by Industry

7KLV VHFWRQ GHVFULEHV FDSWXURQ RI BQ% XD/VWULFSDR
WZR SHULRGV DJHQGD VHWLQJ Q PDNLQD QSK QVHRW
7R GHILQH DJHQGD LV WKH OLVW RI LVVXHV LQ D
LVVXHV IURP GHFLVLRQ PDNHUV DQG S X E L F H Q H W D G D S
> @ 'HFLVLRQ PDNLQJ LV D ILQDQ FSKRLFHV VHQ QXWBR
VHOHFWLRQ RI DFWLRQ DPRQJ VHYHU E O H[SOBUQDQWL
LQYROYHG LQ WKH S O L F G P D N L Q J L S D P L U F R M L W Q H L U

'XULQJ DJHQGD VHWLQJ DQG QHJRGLDWR @ SKDAFHV
HQWKXVLDVP RI WKH W B W R H V V S M Z D F L D Q H W L X G H Q M V V
DQG *XV 'XU DQG FELYLVOKV R Q L H Z V O D V R Z G L % K R D H S F O D V H L V Q J
,Q WKH LGHRORJLFDQ SHUVSHDWRUHU VSKIRU B H P U
EURDGFVWLQJ &62 DXWKRULWD Q L W Q D E Q R S G R D W E L Q U
V\ VWHP UHSUHVHQWHG E\ WKHP > H G W X U M K H G P I R H U H Q U

SULDYDWH ILUP WKDW LQWHQJ W B U S U H R W H S F W D W K I Q I G D
SURFHV LQWURGXFWRQ RI 36% V Q W K H G L D Y I L V Z R F L S
DV WKH \$OOLDQFHURD Q Q S H D G G Q D R H V H D F Q 8 I Q R P H L Q G W
SURSRVHG 36% LQVWLWXWLRQ LQ D E J H R D F G H L Q F W R Q M H U J W L M
P D \ E H D F R P P X Q L W \ E D V H G V W D W L R Q V S U R S R Y H I G Q B % Q
XQGHU 0&,7 ,W ZDV FRWUDU\ WRLQ Q H K H D S D U G H D F H I Q L V
> @

&RPSDUH WR FLYLO VRFLHW\ WKH LQ G P R U H U \ I Q W H R B
LQYROYHG D ZLGH UDQJH RI FROODERUDWLRQ DPRQJ S
KRXVHV DQG EURDGFDVWHU D V V R E L S X E L Q F D W W R Q Q I F D X
PHGLD SURSRVH ODZ GUDIW D Q G V S H Q V F R O D V O D S S U F D F Y
ZLWK OLPLWHG VXSSRUW IURP 55, D V L Q R Q D S B W H R D G L F D W
R Q O \ W K H L U P R Y H W R S X E O L F R S L Q L U R F R W K O H R X H Q R R F L
D Q G P D V V U D O O \

'XULQJ LQ VXPPDU\ FDSWXO D Z E W R R N S O G X M W
VWHSV DJHQGD VHWLQJ V W D H S L D V E X I L W \ Q R J R M W D V
DELOLW\ WR LQIO X H F Q F H F S R S O L F S R P D M F H L Q U I D Y C R W H U R H I V W
FRYHUDJHV DQG QRWHV RI P \ I L H O V L Q Y H V W L J D W H L B Q V
OLWQLFN > @ , I R X Q G D W O H D V W W Z R N L Q G V R I F D S W X
,Q WKH DJHQGD VHWLQJ WKH LQ G X M W W A K H D I S S O K L H U C
UHVRXUFHV RI N Q R F Z I G H G J H R X M Q S W D Q G G L L Y D R Z I Q H U V D Z L G V
SURIHVVLRQDOV GHYHORS PDVVLYH RSLQLRQ WR SUR
LQGXVWU\ DV NH\ DFWRU LQ HFRQ R P L F 7 Q F Z W Q Q Q H I O D V P V

5&7, ,QGRVLDU DQG \$179 \$796, SXEOLVKHG UHJXODU C
 \$W WKH VDPH WLPH \$796, SURYLGHDV GDZV D DQGLQDYLRV
 JRDO DQG DFWLYHO\ VHQQV H[SHUWVHWV SXEOLFLFKW
 JRYHUQPHQW RIILFLDOV
 7KH ORQJ KLVWRU\ RI FORVH UHODVLRQV OELHWLZFDQOS
 REYLRXVO\ HVWDEOLVKHG FRPPRQ IRDQDNHQJ LQKLOFXHG H
 RQ WKH GLUHFWRU IURP WKHLU SDSDUWH DGHGHW JRGR
 SROLWLFDOV QHHG WKHLU VDIHWURYLGHKHSV LQDQGLDQ
 SROLWLFDOV LPDJHV LQ WKH SXEOLFLFKW JKHPLDQV
 LQGLYLGXDO LQFHQWLYH PRGHO >GHDORV KQSKDIFRWHH
 \$QDO\JLQJ VHULHVPI \$796DQGLQDYLRVFRDULYDWH U
 RZQHUV , FRQFOXGH WKH PDLQ QRQDQGLDQVFRDULYDWH
 QDPH RI PLOORQ ZRUNHUV KLJK LQDQGLDQVFRDULYDWH
 SXEOLF XLWLO\ RYHU FRQWHQVUHHQDHWK36%ULQGL
 VWDWH LQWHUYHQWLRQ ,PSURYHPHQW RR36%KZDLUVMZ
 KXJH DUHD RI DXGLHQFH VHUFLH DQGLDQVFRDULYDWH
 55, DQG 795, DV 36% ZLOO EH DVWRQJ FRPSHWLRU
 ,Q QHJRWDWLRQ DQG GHFLVLRQ PDLQDQGLDQVFRDULYDWH
 DJHQGD VHWLQJ ZLWK PRUH LQDQGLDQVFRDULYDWH
 JDWKHULQJ PDVV UDOO\ WKH\ LQIOXHQFH DQGLDQVFRDULYDWH
 PHHWLQJ RXWVLGHQVFRDULYDWHFRDULYDWHFRDULYDWH
 ZKLFK UHFRJQLJH LQGHSHQGHQW ERDQGLDQVFRDULYDWH
 UDLVH SURWHVW E\ DLULQJ µGDKNVFRDULYDWHFRDULYDWH
 IUHHGRP

5 Conclusion

7KLV SDSHU VKRZV WKDW 36% QHGRVLDU GAK
 KDV EHHQ LQWHQVLY \$FWRUHYHUHQVFRDULYDWH LQDQGLDQV
 FLYLO VRFLHW\ 7KHUH LV XQHTXDQSRVUWVFRDULYDWH
 SUHVXUH RYHU SROLFL\ PDNHUV LQDQGLDQVFRDULYDWH
 VRFLHW\)RUPDOO\ %URDGFVWLQVFRDULYDWHFRDULYDWH
 RZQHG ERG\ ,W LWURQVFRDULYDWHFRDULYDWHFRDULYDWH
 SDUOLDPHQW ULJKW WR LWV VHORVWULVFRDULYDWHFRDULYDWH
 SXEOLF +RZHYHU WKHUH LV QR DQGLDQVFRDULYDWHFRDULYDWH
 PDQDJHPHQW 7KH WZR SROLFL\ VHFWRUV DQGLDQVFRDULYDWH
 IDYRXU RI WKH LQDQGLDQVFRDULYDWHFRDULYDWHFRDULYDWH
 ,Q P\ REVHUYDWLRQ WKLV ZDV DQGLDQVFRDULYDWHFRDULYDWH
 7KH JRDO RI WKLV DQGLDQVFRDULYDWHFRDULYDWHFRDULYDWH
 DQG PDLQWDLQ DQGLDQVFRDULYDWHFRDULYDWHFRDULYDWHFRDULYDWH
 DGGUHVW WZR SRVVLEOH VROXWLRQV QHGRV WFRUFRDULYDWH
 &RQFHUQLQJ WKH KXJH VHFWRUV ERDQGLDQVFRDULYDWHFRDULYDWH
 HQHUJ\ WKH SURSRVDO IURP SDUULVFRDULYDWHFRDULYDWHFRDULYDWH
 WR DFFHOHUDWH 36% SROLFL\ UHIRUP GHFRDULYDWHFRDULYDWHFRDULYDWH
 36% JRYHUQDQFH LV D FHQWUDO LQDQGLDQVFRDULYDWHFRDULYDWHFRDULYDWH
 UHVLVLRQ DQG DGGUHVVLQJ QHZ VSHFLILF 36% ODZ
)LQDOO\ WR SUHYHQW LQGLDQVFRDULYDWHFRDULYDWHFRDULYDWHFRDULYDWH
 QHHGHG DPRJ ORFDO DQG LQWHUQDQGLDQVFRDULYDWHFRDULYDWHFRDULYDWH
 LPSOHPHQWDWLRQ \$ PRGHO RI VXSUHVFRDULYDWHFRDULYDWHFRDULYDWH

QDWLRQDO SROLF\ RI 36% FDQ EH DQFOS\ DVHGREL \$W\LSRIQ DR
LQ 6RXWK (DVW \$VLD +RZHYHU LQLFX\ XQXW HWRI LQYFUM
FRDOLWLRQ DPRQJ ,QGRQHVLDOQ S\KOWMLFLOQWK HDVO \$RO
SROLF\ PDNLQJ DQGLEWR XLVPSDFMV WRRSRHHGHGH DQFKKLV
LVVXH LQ WKH IXWXUH

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