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## **What is the Public Value of Public Service Broadcasting?:**

### **Exploring challenges and opportunities in evolving media contexts**

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## Abstract:

This discussion paper elaborates the concept of 'public value' to inform an evaluative framework for examining public service broadcasting (PSB) in the UK, particularly with respect to emerging debates on the future of policy-making in rapidly evolving media contexts. We begin with a case study of the implementation of public value tests at the BBC from 2004 to the present day, analysing how this strategic concept has encapsulated a varying set of principles, regulatory objectives, political challenges and economic pressures facing the UK's largest public service broadcaster. Following this, we offer a prospective typology of six values — social, cultural, economic, industrial, representational and civic value — for defining and assessing the public benefits of PSB within a new media ecology. In so doing, we discern various tensions warranting greater attention in forthcoming discussions regarding a renewed policy settlement for the UK's PSB model.

**Key Words:** Public service broadcasting; BBC; Public value; Digital media ecology; Policy choices

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## Introduction

The future direction of public service broadcasting (PSB) in the UK is widely perceived to be open to question, with the very sustainability of current policy, regulation and public financing facing formidable challenges. Some might be inclined to say that this has always been the case, notwithstanding the PSB system's remarkable legacy of successes recognised near and far around the globe (Freedman, 2020; Mair et al., 2015; Mazzucato et al., 2020). Delve deeper, however, and an array of emergent, potentially transformative factors come into sharper focus within our shifting digital landscape. Regardless of one's preferred stance in relevant debates about prospective scenarios, the remarkable speed with which radio and television broadcasters are revising traditional models of commissioning, production and distribution is plain to see (see D'Arma et al., 2021; Donders et al., 2020; Freedman, 2020; Ofcom, 2020d; Michalis, 2018, *inter alia*, for a range of perspectives on these emerging challenges).

The guiding tenets of the UK's unique mixed-model of PSB are undergoing comprehensive re-evaluation, with their longstanding benchmarks of quality under considerable pressure. Led by the publicly funded British Broadcasting Corporation's (BBC) public service remit to 'inform, educate, and entertain,' this model includes a diverse range of broadcasters which contribute to a collection of public policy objectives, including wholly commercial license holders (ITV in England and Wales, STV in Scotland, and UTV in Northern Ireland, as well as Channel 5), the publicly-owned but commercially-funded Channel 4, and the independent Welsh language service, S4C,

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which is both publicly and commercially funded at this time. One principal rationale for these PSBs, some would argue, is to remedy 'market failures' through 'market interventions' consistent with their licensing requirements (Grade, 2015; Musgrave, 2000; Van Dijk et al., 2006). In contrast, others would contend this model of PSB is reductionist, scarcely recognising the myriad ways in which these broadcasters improve and enlighten British society (Berg et al., 2014; Future of TV, 2016; Goodwin, 2014).

Not surprisingly, then, a language of crisis permeates many of the policymaking deliberations over PSB's economic viability and industrial future impact, especially in a post-Brexit world. Advocates of every persuasion would agree that what counts as 'the market' is in a state of flux. A report prepared for ITV released in May 2021, titled 'ITV in the Nations and Regions,' points out:

TV markets globally are evolving quickly, driven by changes in technology, consumer behaviour and business models; emblematic of these changes has been the emergence of well-funded, global digital players benefiting from their ability to address UK audiences on connected TVs and other devices via the internet, deploying new business models such as subscription video on demand ('SVOD') on a global scale, often facing little regulatory oversight (Mediatique, 2021: 1).

The report continues, illuminating several key implications:

Some of these global players (for example Google, Amazon and Apple) are emerging as 'gatekeepers' in this connected world, extracting substantial value from content providers, controlling the means of addressing connected consumers and collecting and monetising consumer data. These players favour their own content or content supplied by cash-rich partners, often auctioning access to their connected platforms, and the most prominent positions within them, to the highest bidder and seeking to charge ongoing fees that are far beyond the ability of national broadcasters such as the UK PSBs, negotiating only for the UK, to pay (Mediatique, 2021: 1).

Not only are these powerful new entrants (which also include Netflix, Disney, Discovery and HBO) disrupting the national television market, this report surmises, they are also intensifying competition for viewing, talent and revenue. Alarm bells are ringing about the "potentially damaging implications for the delivery of PSB/Public Service Media ('PSM') outcomes and for the creative economy of the UK's Nations and Regions" (Mediatique, 2021: 12).

This discussion paper is informed by a close, textual review of relevant academic and policy studies concerned with the perceived value — and values — of PSB published over the last two decades. Across the first two sections, we provide a longitudinal

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perspective, opening with the BBC's Building Public Value report of 2004, including its introduction of a 'public value test' for proposed new services to pass prior to implementation. Of particular interest is public value as a strategic concept, and how it has been operationalised in evaluative terms. On the basis, we proceed to propose a new typology of multifaceted values – social, cultural, economic, industrial, representational and civic value, respectively – pertinent to the priorities of diverse stakeholders concerned with the objectives and obligations comprising the 'PSB compact' characteristic of the UK's current provision. In closing, we recap this discussion paper's substantive conclusions, briefly highlighting issues for further debate in considering possible ways forward to build on its contribution.

### **From 'Building Public Value' to 'demonstrating distinctiveness' at the BBC**

In June 2004, the BBC published a manifesto for reaffirming its public service mission in the fast-evolving digital media landscape. '*Building Public Value*' (BPV) embraced the language of recent interventions in public value theory to distinguish the BBC's "unique contribution to the UK's broadcasting system." In contrast with a 'market gap' interpretation of PSB, it declared the BBC's aim would be to:

serve its audiences not just as consumers, but as members of wider society, with programmes and services which, while seeking to inform, educate and entertain audiences, also serve wider public purposes. (2004:8)

For audiences presented with ever greater market choice in cable, satellite and insipient digital media services, *BPV* sought to emphasise the BBC's distinct value for them as consumers (who gain personally from using, watching or listening to BBC content) and as citizens (benefitting collectively from the social and cultural impacts of BBC services). At the same time, the BBC's investments and training in the creative industries extend the UK's media markets (2004: 29). These three elements, according to the *BPV* framework, comprised the total public value created by the BBC. Together these characteristics represented the renewed rationale for the Corporation's ethos of providing universal, accessible, publicly-funded services meeting the needs and interests of all audiences.

Delving into detail, *BPV* further specified how the BBC envisions its public value through five themes: *democratic value*, providing independent impartial news to "allow citizens to formulate their own opinions" and engage in national debate (2004:30); *cultural and creative value*, exploring new artistic formats, challenging ideas and reflecting society, free from commercial pressures; *educational value*, supporting learning at all ages and "helping to improve general levels of knowledge and understanding" (2004:35); *social value*, uniting the nation through broadcasting shared public events and giving voice to the UK's nations, regions and local communities; and *global value*, offering a trusted global news service and enhancing the UK's international reputation. These values

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reflected the new 'public purposes', which the BBC proposed should become essential criteria for regulating all of its programmes and services. Success was to be determined by a "performance measurement framework" (2004:15; Ramsey, 2017), with all new or revised services required to pass a 'Public Value Test' to reassess their scale and scope (depth, breadth and vertical integration in production, commissioning, and commercial activities).

The government proceeded to adopt the *BPV* model during the BBC Charter renewal process in 2006, with the BBC Trust — the Corporation's reformed independent governing body replacing the Board of Governors — given authority for administering the new regulatory framework. Whereas the UK's commercial PSBs, such as Channel 4 and ITV, were required to fulfil public service obligations in specific programme quotas, the BBC's public value framework encompassed the entirety of commissioning, production and distribution across the Corporation's publicly-funded operations. In the years to follow, some commentators noted the uneasy tension between, on the one hand, *BPV*'s normative vision of a more responsive, public-driven BBC guided by timeless PSB principles and, on the other, the regulatory processes which in practice appeared primarily concerned with consumer research and the BBC's market impact on its commercial competitors (see Collins, 2007; Lee et al., 2011; Martin and Lowe, 2014; Ramsey, 2017). The BBC Trust's public value assessments employed numerous quantitative measures, such as the reach, cost and value for money of a BBC service, while the broader qualitative contributions to the democratic, cultural or social life of audiences received much less interrogation (Dawes, 2021:11; Oakley et al., 2006:7). In addition, Public Value Tests were complemented by a market impact assessment undertaken by Ofcom, the communications market regulator established in 2003 with the principal aim of promoting media competition across the UK's media and telecommunications industries (Livingstone et al., 2007; Smith, 2006). Such methods, as Freedman (2008) noted, "are far better suited to an understanding of broadcasting as a straightforward economic, rather than a complex social and cultural, practice" (2008:157). In contrast with certain formulations of public value theory at the time (e.g., Moore, 1995), the model adopted by the BBC envisaged the public more as 'service users' with aggregated needs and interests, rather than as active participants in a "social dialogue of the commons in which plural perspectives about what is of value co-exist" (Meyrick and Barnett, 2021:79).

### **Public Value as a Strategic Concept at the BBC**

Equally important for our purposes here is charting the changing use of public value as a strategic concept at the BBC over the years since *BPV* reset its terms. Priorities were recalibrated in response to changing institutional (as well as political) contexts: new audience behaviours, growing market pressures, significant cuts in public funding, as well as the wholesale restructuring of the BBC's governance and regulation. These factors have all contributed to an evolving transfiguration of the impetus behind the

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public value framework, resulting in certain notions of value taking precedence over others.

In the early years of the 2007-2016 Charter period, the Trust conducted four Public Value Tests on various changes to services proposed by BBC management. The expansion of BBC on-demand delivery services (including the launch of BBC iPlayer), the provision of a high-definition BBC TV channel, and the creation of a Gaelic public media service (now MG Alba) were approved. The Trust accepted the BBC management's argument that these new ventures would not only improve the reach and quality of BBC services, but also "help licence fee payers migrate to and get value from new digital technologies" (BBC, 2007:30). At the same time, the Trust rejected plans for a 'Local Video' network of news and sports websites, finding it "would have a significant negative market impact" on regional news publishers (BBC Trust, 2009:8). It also questioned the appeal of an online service not including local listings or general entertainment.

Throughout each of these Public Value Tests, the Trust was alert to points of tension and possible criticism. Changes offering new or increased benefits to the public (e.g., creating democratic and representational value through providing public interest news tailored to local communities) were debated predominantly in the language of individual benefits (e.g. enhancing viewer choice or increasing the value for money of BBC content). Evidence of a lessening in competition or negative impact on the commercial media sector, including the UK's commercial PSBs such as ITV, recurrently overshadowed any contrary claims looking to prioritise citizen or consumer value.

A 2010 discussion paper by the BBC Trust (Coyle and Woolard, 2010) offered a revaluation of the uses and meanings of public value for the Corporation. Drawing on other investigations of public value by the Cabinet Office (Kelly et al., 2002), Arts Council England (Bunting, 2007) and the Work Foundation (Hills and Sullivan, 2006), the Trust paper – subtitled 'Restoring the ethos of public service' - provided a detailed examination of the various approaches and issues in assessing public value. The authors note that identifying and measuring discrete forms of value poses a challenge because of "how the idea of 'what the public wants' can be interpreted when the public consists of many varied individuals with different and often contradictory needs and preferences" (2010:14). Their discussions also focus on the essential role that trust and accountability play in affording the BBC with the legitimacy (and funding) to pursue its public service objectives as a collective enterprise distinct from the wider media marketplace.

Public value is thus not simply about services which reflect "the static public interest", but a wider shift in doctrine that promotes:

active engagement in order to involve people in a process, which will enhance their capabilities as citizens, rather than simply capturing their passive reactions through their voting – or

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shopping – choices. (Coyle and Woolard, 2010:20; see also Bennington, 2009:238; Lis et al., 2018:31)

Although there were no substantive policy or regulatory shifts resulting from this 2010 paper, residual indicators of its commitments – not least a focus on directly involving audiences in the value creation process – appear in BBC documents ahead of the 2016 Charter renewal debates. The BBC Trust's 2015 distribution framework, for instance, privileged identifying audiences' content preferences as an essential component in developing the Corporation's on-demand services (2015a:6). Further, the BBC management's Charter Review manifesto, '*British, Bold, Creative*', stressed that the public value of a universal media service is not solely about free-to-air TV or radio: it also requires making content available on the devices and platforms most widely used by audiences (BBC, 2015a:17).

The extent to which these guiding tenets amounted to a transformative shift in audiences' viewing preferences was brought into sharp focus during the final Public Value Test conducted by the BBC Trust in its relatively short lifespan. In assessing a range of proposals from BBC management, the Trust approved the closure of the young audiences-focussed television channel BBC Three and its 'reinvention' as an online-only content brand. BBC management framed this move as a test case for reimagining the public service remit in the digital age. Closer inspection revealed the strategic rationale for closing the only dedicated 16-25s television service centred on the financial constraints placed on the BBC by successive funding freezes, together with the shifting viewing and technology habits of the channel's target audience (BBC, 2015b:16-7). The Trust's evaluation of the proposals accepted the assumption that the "long-term future of broadcasting seems likely to be online" and welcomed the £30m in savings the channel closure would open for the BBC (BBC Trust, 2015b:3-4; see also Ramsey, 2016:161-3).

Perhaps more revealingly, the Public Value Test effectively ignored the sizeable public objections to the proposals, which included over 300,000 signatures for the '#SaveBBCThree' online petition. In attempting to balance the various forms of value that BBC Three represented to its audience and to licence fee payers as a linear channel, the Public Value Test appeared to prioritise economic and strategic goals ahead of a more considered, participatory process that might have interrogated more deeply the reality of changing viewing habits amongst younger audiences. This rush to embrace what appeared to be a more cost-efficient digital future is all the more apparent six years on, with Ofcom approving the BBC's request to re-open a dedicated BBC Three broadcast channel. In so doing, the BBC conceded it has "struggled to deliver enough value" given the slower-than-anticipated transition from linear to non-linear viewing amongst younger audiences (2021a:10).

The BBC Three case also shows the extent of political pressures weighing on public service broadcasters' ability to define and create public value, particularly in relation to the impact of government decisions on the BBC's unique model of public funding.

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Licence fee funding settlements in 2010 and 2015 — which have amounted to a 30% reduction in total BBC income over the past decade — together with the 2016 Royal Charter review, have engendered a radical impact on the BBC's strategy and how the Corporation evaluates 'public value' as an over-arching organisational philosophy. The new Charter revised the BBC's regulatory framework with a new focus on 'distinctiveness', a term which emerged from criticisms that the BBC was 'crowding out' competition by funding content in areas already served by commercial broadcasters (DCMS, 2016:33-6; ITV, 2015; Sky, 2015).

With a new top-level requirement to be "substantially different to other providers across each and every service" (DCMS, 2016:32), the notion of public value has been all but eclipsed by an even greater emphasis on the BBC minimising its market impact on other broadcasters, even where evidence suggests that neither the BBC nor PSB systems in general produce a discernible 'crowding out' effect (KPMG, 2015; Sehl et al., 2020). Ofcom has taken over from the now-abolished BBC Trust to hold authority over both the Market Impact Assessments and Public Interest Tests, which have replaced the Public Value Test as the mechanism for evaluating BBC services. Whereas the term 'public interest' had previously described a macro-policy of complementary balance between public and private broadcasters, the BBC is now held to a regulatory model in which "qualitative issues are never allowed to stand for themselves, but are immediately imbricated within a qualitative-quantitative, and/or sociocultural-economic perspective" (Dawes, 2021:12). Although citizen benefits of PSB such as social, cultural or educational value are still prevalent in the BBC's central mission and regulatory rationale, these outcomes are more often expressed as additional benefits or subordinate effects of the economic 'value for money' that the BBC offers to its viewers and listeners as consumers (BBC, 2021b).

### **Prospective Typology for PSB Public Value**

The BBC's evolving use of 'public value' highlights a number of instructive trends, in particular how the implementation and definition of the concept is moulded by a mix of institutional priorities and exogenous changes in the wider (not least economic and political) contexts of broadcast media. However, the above overview is also instructive for showing that public value is not just a label that can be used to describe specific regulatory or managerial frameworks. The term has a wider analytical use for examining the benefits (and disbenefits) that underpin a collective system of interacting public interventions in the media ecology. Public value thus serves as both a descriptive framework for normative goals, as well as a tool for assessing how effectively these values are fulfilled and to what extent they align with public expectations.

The following sections of this discussion paper are intended to illustrate our own evaluation of the various types of 'value' apparent in the contemporary policy and

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regulatory frameworks that constitute public service broadcasting in the UK. These sections explore how separate themes of 'value' are addressed in this country's policy, the normative objectives or principles these values seek to promote, as well as the tensions and challenges affecting how these values are (or are not) being addressed. Based on the six values we have identified, we offer a prospective typology of the values of UK PSB, one seeking to inspire an open discussion about how 'public value' might guide future policy at the intersection of 'traditional' PSB ideals and the rapidly changing digital media environment.

### Social value

In recognising the unique nature of broadcasting media as non-rivalrous and non-excludable 'public goods' (Berg et al., 2014; D'Arma et al., 2021; O'Neill, 2016), PSB produce a significant *social value* through providing free, equitable access to media content that fosters a national conversation and democratises access to information. Current UK PSB policy for creating social value is broadly organised around two inter-related principles: universality, the aim to serve the needs and interests of all audiences and open them to a range of different perspectives (Born and Prosser, 2001; Donders, 2019; House of Commons [HoC], 2021; Ofcom, 2005:7; 2020d:8; Trappel, 2014; van den Bulck and Moe, 2018); and accessibility, making PSB services widely available, prominently displayed and discoverable on different distribution platforms, and not limited by a person's ability to pay (Channel 4, 2013; EBU, 2012; Future of TV, 2016; Ofcom, 2015:28; 2019:9).

Recent audience research suggests that these objectives are widely valued by the public (DCMS, 2016:109; Ofcom 2020c; Ofcom/Jigsaw, 2020:42). However, there remains an inherent difficulty in assessing the contribution that PSBs make to qualitative ideals such as social equity or national cohesion. As explored above, this social value cannot be easily judged by the forms of quantitative market analysis favoured by PSB oversight bodies such as Ofcom (D'Arma and Labio, 2017; Goddard, 2017; Ofcom, 2017; Ramsey, 2017). In addition, evolutionary shifts in audience habits and production trends have invited deeper questions about the relevance of these principles in the era of global media competition. The rapid growth of subscription video on-demand services (SVODs), video sharing websites and myriad other digital formats has not only disrupted 'traditional' broadcasting (D'Arma et al., 2021; Donders, 2019; Lobato, 2019; Lotz, 2017), but has rapidly expanded how, when and where audiences can consume an almost limitless supply of content.

Although services such as Netflix and YouTube may have fundamentally changed how audiences act as content consumers, the new media ecology has not yet demonstrated "whether the sum of individual preferences and choices are adequate to satisfy the broader social, cultural and political interests of a collective group as a whole" (Berg et al., 2014:110-1). PSBs arguably still hold an essential role in freely and

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equitably meeting the needs and interests of all audiences, as well as providing a space for developing a shared sense of national community. The future public loyalty and sustainability of these social purposes will largely depend on how well the UK's PSB system adapts existing services (or even established new ones) in an increasingly fragmented, non-linear and 'platformised' environment (Donders, 2019:1019). This may involve more closely reflecting how different audiences discover, access and consume media content, such as incorporating 'Big Data' techniques and customisation features that characterise their subscription video on-demand (SVOD) rivals (D'Arma et al., 2021; Murschetz, 2020), or updated prominence regulations to ensure that audiences still benefit from exposure to new and challenging PSB content on digital as well as terrestrial platforms (Ofcom, 2019; House of Commons Select Committee, 2021:52-3).

### Cultural value

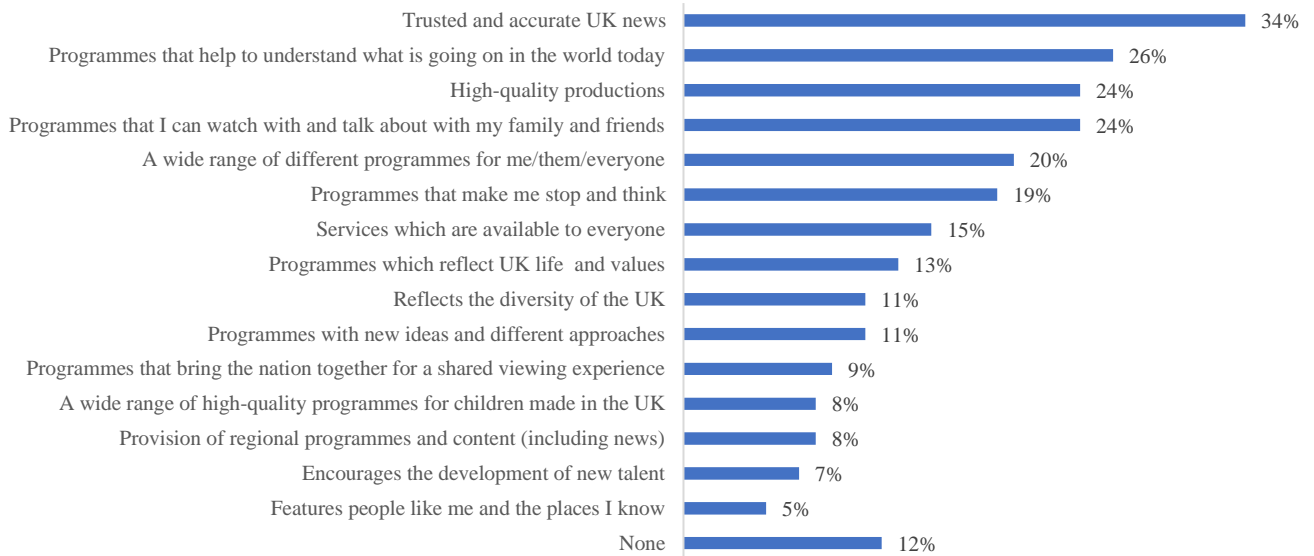
In addition to creating social value through enabling universal provision of and access to broadcast media, the UK's PSB model also creates *cultural value* for audiences through the production of high quality original content across formats and genres. This value emerges from two broad policy objectives: striving for cultural excellence in the standard and creativity of PSB content beyond what is ordinarily produced by the market; and promoting the production of UK-originated content that reflects issues and experiences relevant to British audiences. These measures contribute to the diversity, originality and creativity of arts, culture and education publicly available through broadcast media. "The arts not only improve our quality of life," as Genders (2020:71) points out, "but also make us better citizens through offering alternative perspectives on contemporary issues and fostering mutual understanding between cultures and communities."

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**Figure 1. Polling on the personal value of PSB (Ofcom, 2020c)**

"Which three benefits [of PSB] do you consider to be most valuable for you personally?"



The public value of PSBs providing high-quality content and cultural range is supported by recent polling by the UK media regulator Ofcom (see Figure 1). 24% and 20% of respondents respectively rank these two characteristics in their top three most valuable benefits out of fifteen core PSB characteristics (2020c:4). In separate polling, some 72% of audiences surveyed viewed 'creating programmes that reflects the lives and concerns of the British public' to be an essential characteristic of the PSB model (Ofcom 2020d:19). UK PSBs produce 29,800 hours of original UK content, compared to just 571 hours available on SVOD services (Ofcom, 2021a:69; PSBs, 2020), demonstrating significant levels of PSB investment in culturally distinct UK content (BBC, 2019:11; Enders Analysis, 2021; VLV, 2019).

The Covid-19 pandemic has further demonstrated audiences' appreciation of the cultural impact of programming that "is not, and sometimes could not, be replicated by other providers", particularly news, education, specialist science, history and arts, and children's programming (Ofcom/Jigsaw, 2020:43). As we have argued as part of the current debate on the potential privatisation of Channel 4, the stripping-back or lessening of PSB obligations as part of a commercial sale would almost certainly decrease Channel 4's cultural contribution to a distinctive and diverse public service media ecosystem (Cardiff PEC, 2021). This does not necessarily mean that the maximal public value of PSB lies in only delivering genres that the market fails to sufficiently deliver on its own. As Pact, the independent producers' trade association, argued during the most recent BBC Charter review,

Genres such as drama, entertainment and comedy are part of this country's cultural heritage [and] at the heart of BBC programming, delivering on what licence fee payers expect to see on-screen. (Pact, 2015:10)

By providing a wide range of formats and genres across distinct public, not-for-profit and commercial remits, the UK's mixed PSB ecology engenders a competition for quality in popular genres like drama and entertainment, rather than a competition for funding. At the same time, it encourages investment in 'merit' content, such as education and the arts.

The UK PSB model nonetheless faces stark challenges in maintaining and growing its cultural value in the future. Rising production costs threaten to price out UK PSB investment in key cultural genres, such as high-end drama and factual documentaries (Ofcom, 2021a:70-5). Funding squeezes to public funding, falling advertising revenues and cuts to subsidy schemes, such as the Young Audiences Content Fund, similarly may lead to PSBs offering a narrower range of programmes in specialist genres — diminishing their distinctiveness from market services and weakening audience appeal (D'Arma et al., 2021; House of Lords Communications Committee [HoL], 2019:43; Steemers, 2017).

### Economic value

As explored above with the BBC, contemporary economic policy on PSB typically focuses on monitoring (and even limiting) the commercial impact of publicly-funded structural interventions in media markets. However, the changing conditions in both national and global media markets also call attention to the positive economic value that PSB creates for the UK public. Recently the BBC, Channel 4 and ITV have all employed calculations of 'gross value added' (GVA) to demonstrate the positive rate of return created by their public service enterprises. Analysing employment, spend on goods and services, investment in creative sectors and other induced activity, these studies present compelling measures of PSBs' contributions to the UK economy (see EY, 2021; KPMG, 2021; Mediatique, 2021). KPMG (2021:4) estimates that every £1 of BBC spending in 2019/20 generated a further £1.63 of economic activity, while Mediatique's (2021:59) research identified £538m of added value generated by ITV in the nations and regions in 2019.

Such analysis points to a more holistic view of assessing the 'costs versus benefits' of public interventions in media, balancing the impact of PSB on commercial competition with the broader value of public investment to both the national and regional economies. In weighing the 'trade offs' implicit to PSBs' broader social, cultural and democratic benefits, it is also important to consider how the sustainability of these

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benefits depends crucially on audiences' own perceptions of the transactional 'value of money' of PSB providers (Lowe, 2016). Recent reports by the BBC have sought to emphasise the relative good value for money that the current £157.70 a year compulsory licence fee offers to the public, estimating that an equivalent hypothetical private subscription package of media services would cost £400 a year. Due to long-term efficiency savings and below-inflation increases in the licence fee since 2010, the BBC suggests that its universal funding model enables it to keep overall production costs lower than currently achieved by SVODs and as a result is "providing much more to audiences now, for less" (2021b:30-31).

The sustainability of this funding commitment, however, ultimately depends on the public's willingness to pay for PSB services in exchange for the perceived value they receive in return. Recent opinion polling complicates any easy assumption that the public believe the licence fee offers good value for money (YouGov, 2021), granting credence to recent government efforts to subject the compulsory licence fee model to wider debate. Across the PSB ecosystem UK broadcasters face declining public and commercial advertising revenues (Ebiquity, 2019). Inflationary production costs in high-end genres like drama — a result of the rapid influx of investment and competition from ascendent streaming platforms such as Netflix and Amazon — threatens to squeeze PSBs out of making programmes that sit at the core of their audience 'offer' (HoL, 2019:43; Ofcom, 2020d:36). These challenges point to the importance of economic value both as a beneficial outcome of PSB interventions, and as an essential complement to other forms of value. If audiences do not allot personal value to PSBs' output, they are unlikely to view those organisations as economically effective or relevant to them. In turn, without a strong sense of the economic legitimacy of PSB, the public may no longer support mechanisms for the sustainable funding of PSB services that produce social, cultural, or other forms of value.

### Industrial value

Economic criteria such as efficiency and value for money are not the only means by which public funding and public service regulation create additional value for UK audiences and the broadcasting market. Public service broadcasting also generates a distinct *industrial value* for media businesses and the creative workforce, through investing in infrastructure, skills and technological innovation to fuel growth in the creative industries and catalyse the quality of the UK's production base (HoL, 2019:11). Whereas policies aimed at maximising economic value typically focus on exchequer revenue, consumer choice or GVA assessments, the industrial value of PSB emerges from the cumulative "market shaping" effect of PSB. In Mazzucatio et al.'s (2020) words, it "crowds in private investment and creative processes through 'de-risking' or opening up activity in the media innovation chain" (2020:32, see also Donders et al., 2020). This process, while comparable to the spill-over effects generated by all producers in the media market, emphasises the wider potential of PSB investment to

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actively pursue socially beneficial public policy interventions in national or regional economies.

These industrial benefits can be seen across a variety of top-down regulatory interventions, as well as in the investment activities of PSBs themselves. In recent years, the BBC, ITV and Channel 4 have played a formative role in establishing concentrated centres of employment and investment that serve as ‘anchors’ for localised clusters for the UK’s TV, radio, film and digital sectors, each “creating demand for a specialist supply chain” of businesses and services (KPMG, 2021:36; Mazzucato et al., 2020; Porter, 1998). The 2003 Communications Act requires that independent productions account for at least 25% of hours of first-run PSB programming, while the ‘publisher-broadcaster’ status of Channel 4 and S4C together with recent reforms of the BBC’s commissioning has resulted in PSBs accounting for 77% of commissioning demand for UK independent production companies (Pact, 2021:9. See also BBC, 2021c:19-20; Channel 4, 2021:21; Ofcom, 2020d:23).

The ‘Terms of Trade’ agreed in 2003 between PSBs and the independent production sector further ensure that smaller producers retain a share of revenues from their commissions, while holding Intellectual Property (IP) rights over future content use. This symbiotic relationship is crucial to the health and global competitiveness of the UK’s production sector (Pact, 2021:3). It distinguishes the industrial benefits of PSB’s public ethos — investing in small- and medium-sized businesses across the country while widening the diversity of suppliers producing public service content — from the more profit-oriented rationale of global streaming services (HoL, 2019; KPMG, 2021; Mediatique, 2021; Oliver and Ohlbaum, 2018; Pact, 2021).

The UK’s PSB model also enhances the long-term sustainability and competitiveness of the UK screen sector, primarily through investing in a highly skilled workforce and sharing the benefits of new media technologies across industry stakeholders. These efforts are supported by a range of PSB policy measures and industry initiatives, such as Channel 4’s ‘4Skills’ programme aimed at “attracting people from diverse backgrounds into our industry” (Channel 4, 2021:41, see also EY, 2021:41-6) and cross-sector initiatives, such as ScreenSkills and the National Film and TV School, which markedly boost funding for training and skills. On market-shaping innovation, licence fee funding played an historic role in developing the UK’s technological advances and public dissemination of HD TV programming, the digital switchover, digital archiving and, most significantly, video-on-demand streaming, all of which helped to de-risk market entry, incentivize investment in UK media and improve the overall quality of services available to UK audiences (HoL, 2019:29; KPMG, 2021:28; Nesta, 2015). Netflix’s founder and CEO Reed Hastings, as one prominent example, has previously praised the innovation of BBC iPlayer which he suggests “blazed the trail” for meeting audiences’ expectations for on-demand viewing before commercial SVOD platforms had established themselves in the emerging marketplace (quoted in *The Telegraph*, 2014).

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However, there is a hanging question of whether industrial value is a component feature of PSB, or - as some critics suggest – simply a sub-set of economic value otherwise functioning within the UK's media ecology. References to PSBs' contributions to the creative economy are increasingly prevalent in policy papers by the PSBs themselves, yet truly demonstrating this value will require evidence of the *added value* that public investment grants to both the industry and to the public as key stakeholders with differing requirements. This balance will become much more apparent as policymakers take stock of different approaches for regulating the role of SVODs and 'big tech' in UK media. Examples include extending Terms of Trade requirements to companies such as Netflix, and thereby ascertaining what advantages or disadvantages this may bring for the UK's PSB framework. There is also potentially a deeper risk of disconnect between public perceptions of the personal value of their investment in PSB (i.e., high-quality content, accessibility, value for money) and the benefits they expect to derive from PSBs' financial support for the wider creative industries (Lowe, 2016:45).

### Representational value

UK PSB has a pivotal role to play in representing the diverse lifestyles and communities that make up modern society, as well as tackling systemic inequalities and exclusion facing minority groups within the cultural and creative industries and beyond (Future of TV, 2016; McQuail, 2019; Nieminen, 2019). Due to public funding and/or regulatory obligations to serve all UK audiences, PSBs create *representational value* through striving to ensure that all voices and identities of the UK's multi-cultural, multi-racial society — not just those from the largest or traditionally dominant groups — are reflected in the national conversation and have a genuine role in sustaining it.

Channel 4's founding mission, established in 1982 and formalised in subsequent public licences, centres on providing content that “appeals to the tastes and interests of a culturally diverse society” (Ofcom, 2014:11). It explicitly aims to serve minority audiences who would otherwise be missed by broadcasters focused on the interests and demands of larger audience bases. The BBC's renewed 2016 Charter similarly includes a public purpose to “accurately and authentically represent and portray” UK society (DCMS, 2016:12), while Ofcom's sector wide reviews of the core purposes of PSB have emphasised the importance of catering to under-represented groups for contributing to a more inclusive, tolerant and pluralist society (Ofcom, 2005:7; 2020d:15). Minority language channels such as S4C and BBC Alba, bespoke services aimed at ethnic groups like BBC's Asian Network, ITV's regional news networks and statutory quotas for 'out of London' production together mark a significant contribution across UK PSBs to meaningfully representing all groups and communities (Channel 4, 2019:53; Future of TV, 2016:103; McElroy and Noonan, 2018:160; Ofcom, 2018).

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PSBs also create representational value by widening employment opportunities in the creative industries, and by enhancing the role of under-represented groups as broadcasting talent, production staff and managerial or executive figures within PSB organisations. This is a vital step for ensuring that PSBs more accurately incorporate the diversity of the UK population into how they conceive of their audiences and attendant priorities. By improving the inclusion of varied opinion and expression, this representational value also signals a standards threshold for the wider broadcasting industry to follow. Mazzucato et al. (2020:33) use the example of PSBs featuring more women as lead presenters in their sports coverage, which advanced gender equality in the historically male-dominated sector and “had the spillover effect of creating role models and ‘normalising’ new attitudes about women in sport” (see also McQuail, 2019). This is not to suggest, however, that PSBs’ improved recognition of the importance of representation means these organisations have fully grasped the impact of structural inequalities relating to class, gender, ethnicity and regional factors, amongst others, continuing to blight the wider UK screen industries (see Carey et al., 2021; McElroy and Noonan, 2018; and Rogers 2020).

Further to this, there is also a significant gap between how the UK public rates representational value as a PSB priority and how audiences rate the effectiveness of PSBs at delivering it. ‘Reflecting the diversity of the UK’ is highly rated by audiences as an important value provided by PSB, but in one recent Ofcom survey only half of UK audiences felt PSBs accurately portrayed their own nation/region to the rest of the country (Ofcom, 2020d:19; 2020c:6). Moreover, the economic challenges facing all UK broadcasters pose a growing threat to the ability of PSBs to sustain a corresponding provision of content (McElroy and Noonan, 2018:161). Emerging campaigns to improve representation on screen and behind the scenes, such as the BBC’s ‘diversity and inclusion plan’ and the Creative Diversity Network’s cross-industry Diamond project, show the growing recognition of this gap and its significance for the wider public value of PSB. Still, the solution need not be left solely to existing public service organisations. Further reforms for improving the representational value across the UK PSB system may include introducing new sources of contestable funding, or additional public service initiatives beyond the main PSBs, to buttress existing efforts at improving media diversity (see also BECTU, 2020; Ofcom 2021a; Malik, 2013; McElroy and Noonan, 2018).

### Civic value

Public Service Broadcasting also creates a distinct civic value through empowering the public to participate in democratic processes, by informing individuals about the world around them, raising awareness of issues that affect their lives and communities, and fostering audiences’ sense of their own place in public life (Ofcom, 2020:25; Trappel, 2014:133). This civic value is most commonly associated with the TV, radio and online news media services provided by PSBs. Audiences rate the provision of trusted and accurate news as the single most valuable benefit that UK PSB creates both for

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individuals and for society overall (Ofcom, 2020:7). Further research from Ofcom, as well as the Reuters Institute, confirms the status of the UK's free-to-air PSBs as the most used and most trusted sources of news and current affairs for British audiences (Ofcom, 2021c:23; Reuters, 2020:62).

Intense consolidation in the supply of commercial print, TV and radio news, together with the increasing prominence of unregulated 'big tech' firms in determining how UK audiences find and access news, marks a period of major disruption for traditional news formats (Media Reform Coalition, 2021; Plum Consulting, 2020). In this context, the civic value of the UK's PSB framework is further demonstrated by its role in sustaining a plurality of voices featured in public discourse (Future of TV, 2016; HoC, 2021; HoL, 2019; Reuters, 2019; Trappel, 2014) and "tackling the spread of disinformation online" during crises, such as the Covid-19 pandemic (HoC, 2021:31).

Accurate, reliable news is a major public benefit, yet we would add a second dimension to the civic value offered by PSBs: serving as independent and accountable institutions whose governance, funding and management are all intimately tied with public decision-making processes. While the lines of PSB accountability often run through opaque political or regulatory bureaucracies rather than direct public oversight, the unique structures of the BBC, Channel 4 and S4C nonetheless distinguish the corporate and institutional identity of these organisations and tether their media operations directly to a collective sense of public ownership. As pay-TV providers and SVODs continue to expand their commercial models around content personalisation and curated recommendations, PSBs will need to foster a more open, inclusive culture — including cultivating audiences' participation in the commissioning and production of public service content (Future of TV, 2016:30; Hind, 2012:156; Vanhaeght and Donders, 2015:292). In so doing, they will better distinguish the value of their unique public status from the market (D'Arma et al., 2021; Murschetz, 2020; PSBs, 2020; Van den Bulck and Moe, 2018).

The UK's PSB model faces further systemic challenges in generating civic value, including but not limited to: widening generational and educational divides in who uses and values PSB news services (Reuters, 2019:29); the reluctance or inability of younger audiences to pay for online news sources (Kammer et al., 2014), the appearance of traditional news outlets as being irrelevant to their media consumption habits (Flamingo/Reuters, 2019:43); constrained public funding for local journalism (Cairncross, 2019:96); the dwindling provision of news services for children exacerbating issues of online safety and media literacy (Carter et al., 2021); and the increasing politicisation of appointments, funding settlements and policy decisions relating to PSBs. If PSBs are not recognised by audiences as independent, relevant or appealing sources for news, this naturally poses a significant threat to the future support and loyalty for public service news outlets.

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## Conclusion: The Future of Public Value and PSB

Much like the underlying theory of public value itself, the definition and delineation of the six prospective values in our typology is open to critique. Interpretations will vary, of course, but we suggest a distinctive feature of our typology is that it centres the public as the principal stakeholder of PSB and, crucially, identifies the different categories of needs and interests that define the public's relationship with a public media system. In order to fully delineate the importance of PSB in the contemporary media landscape, it is essential to consider the distinct goals and concerns that arise from the public's concurrent place and ethos as a national community (social value); as viewers and listeners with individual interests, tastes and preferences (cultural value); as consumers alert to market affordances and constraints (economic value); as investors in the creative industries (industrial value); as an embodiment of diverse identities and aspirations (representational value); and as citizens concerned with public affairs (civic value). Understanding the extent to which the public perceives the various core purposes of PSB as relevant or valuable to their own media usage is a pressing priority for further research. Developing a broader public value framework, like the typology we have proposed above, may offer a useful means through which to interrogate such inter-related purposes and outcomes.

The relationship between PSB and under-30s audiences, for example, warrants much greater attention from researchers than it has typically received to date. This demographic group actively negotiates tensions arising from the evolving, uneven uses of digital media technologies, some of the implications of which complicate the normative ideals of public value currently driving UK PSB policy. Case studies of this sort may prove especially useful for developing a future policy model that employs the theoretical basis of public value to bridge PSB with the emerging concept of public service media (PSM). In what ways, for example, should the normativity of public value ideals in broadcasting be assessed to ensure they resonate with diverse interest communities in other media contexts? What counts as a 'public service' ethos, and how best to distinguish it in relation to the commercial imperatives of global streaming services and online video platforms, which comprise increasingly larger shares of audiences' consumption habits? What tensions reverberate across the notions of 'value' implicit in the UK's current PSB regulatory model, and how might further or re-targeted investment better deliver publicly desirable commitments? Are certain values and principles of greater public benefit than others? What new values or commitments might UK PSM look to fulfil that have hitherto been unfeasible or undesirable in a PSB context? Lastly, what role might other commercial (non-PSB) media organisations, such as SVODs and social media platforms, play in contributing to a revised public value framework, and how will the UK's existing PSBs need to change to best support the underlying goals of UK policy?

We invite policymakers, industry stakeholders, audience groups and other interested parties to engage in an open discussion about our prospective typology, to recalibrate

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its guiding tenants and test its relative usefulness for re-envisioning the future of public service broadcasting in the UK and beyond.

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