



Five Theses on Public Media and Digitization: From a 56-Country Study

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This article examines developments at public-service and state-administered media organizations based on a global sample of country case studies and selected secondary data. Most public-service and state media organizations have experienced a decline in revenue and audience and a tendency to weaken the program remit, but the overall direction of change is not one of uniform, marked, or irreversible decline. Although successful models of public service for the digital age have emerged, recent evidence suggests that neither the weakening of state broadcasters nor their reform into independent public-service media are inevitable results of digitization.

Keywords: public service, state broadcasting, regulation, independence

Introduction: A Crossroads for National Media Systems

The rise of broadcasting in the 20th century established new relationships among states, publics, and the media. Alongside private media, some countries established broadcasters with closer links to the state and a nonmarket model of accountability to the public. Relationships between these institutions and governments as well as other centers of power became key challenges, with some countries adopting direct state administration of broadcasters and others favoring independent public-service broadcasting.

A unique set of institutional arrangements for broadcasting evolved in each national setting. In some cases, the constitutional framework defined fundamental duties for all broadcasters. In others, ownership and operation remained in private hands, with duties left undefined. In some countries, the market share of publicly owned broadcasters was small, and in others they were—and in many cases, still are—dominant. In all countries, allocation of broadcasting frequencies was the responsibility of agencies of the state. Broadcasting institutions generate the meanings and narratives that frame reality for citizens.

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For this reason, governance of these institutions has been a source of conflict that resurfaces during times of change.

State-administered and public-service broadcasters all over the world face challenges as they come to terms with the new realities of digital media. A major structural shift is under way, with uncertain outcome. Some have been able to parry the challenges of new competitors and declining audiences and grasp the opportunities afforded by new services and delivery platforms. Others, due to political and regulatory constraints or a lack of audience demand, have been less able to respond and have seen their audiences dwindle. How this process of adjustment plays out in each national context, and the extent to which new global and regional norms of governance emerge, will play a key role in the evolving structure of democratic communication systems for some time to come.

After more than a decade of debate about how broadcasting governance *should* respond to digitization, this article examines the evidence about how it *is* responding. As outlined below, there is no shortage of theory about what is happening: Some claim that the fundamental economic models of state and public-service broadcasters are broken due to long-term decline in audiences and funding. Others argue that new funding models, as well as digitization-related reductions in costs, are offsetting these challenges, leading to a new golden age of public media. There are claims that broadcasters' remits are being watered down and commercialized amid a radical restructuring of the basic regulatory compact that underpins broadcasting. And while some commentators argue that digitization leads to pressure for more independence of broadcasters from government, others are less optimistic. This article examines each of these claims in the light of evidence from the Mapping Digital Media (MDM) project, the largest international study of media policy ever conducted.

The MDM project has focused on the particular dynamics and tensions faced by publicly owned broadcasters that enjoy state-granted funding and/or distribution privileges that have historically guaranteed huge audiences but also brought the danger of political interference. Nonmarket ownership and control is the common defining feature of state-administered and public-service broadcasters. It is, of course, important to distinguish between media controlled by the state and independent public-service broadcasters; thus, in this article I use the generic term *state-administered/public-service broadcasters* (SA/PSBs) when referring to the common group, but I make a distinction between the subcategories of *state-administered* (SA) and *public-service broadcasters* (PSBs) as appropriate. When I wish to stress that public-service organizations are providing services on nonbroadcast platforms, I use the term *public-service media* (PSM). I return to the issue of how digitization impacts the balance between SA and PSB in the concluding section.

Defining terms is a challenge when categories are essentially contested and phenomena rapidly changing. The SA/PSB category includes a range of institutions from China's state-administered China Central Television (CCTV) to the independent Dutch public-service broadcasters that form NPO, the network of public-service broadcasters in the Netherlands. Although there are no generally accepted definitions, I define state-administered broadcasters to be those in direct control by party or state agencies; public-service broadcasters generally are not commercially run and have constitutional guarantees of independence from the state. This article examines both categories. This should not be read

as an attempt to deny the importance of the distinctions between state-run and independent broadcasters. Rather, the reason to combine these categories of broadcasters is that it enables us to compare and contrast the fortunes of both PSBs and SAs and identify common challenges with the evolution of various aspects of the state-broadcaster relationship. It also avoids the difficulty of creating a contested category of PSBs that would be disputed by those claiming that any given broadcaster is captured by state power.

Theoretical Reflection: The Mapping Digital Media Study

There has been a sustained effort on the part of media reform campaigners and nongovernmental organizations to use the reform opportunities triggered by digitization to encourage the transformation of SAs into genuinely independent PSBs. Many of those involved saw the digital transition as an opportunity to open up markets and transition state-controlled broadcasters into independent PSBs (see, e.g., Mendel, 2011; Smith, 2012). Where PSBs were firmly established prior to the introduction of digital media, civil society campaigns have focused on renewal: The transformation of public-service broadcasting into "public service communications" (Tambini & Cowling, 2004) or "public service media" (Iosifidis, 2007, 2011; Jakubowicz, in Klimkiewicz, 2010; see also Council of Europe, Committee of Ministers, 2007; Lowe & Steemers, 2012).

Given the importance of these questions for democratic development, it is surprising that there is not more systematic research on the evolving role of PSB globally. Public debate is increasingly polarized and self-interested: Commercial media claim that they are in crisis and that free public media threaten their very existence.² On the other hand, public-service media claim to be in crisis around the world due to the capture of policy by corporate interests (Freedman, 2008). Experts are divided. Michael Tracey (1998) announced the "decline and fall" of PSB some time ago, but Chris Hanretty (2012, p. 7), having reviewed the available evidence, argued that "public service broadcasting enjoys far ruder health than the declinist narrative suggests."³

Hence the Mapping Digital Media project, which commenced in 2009 and published its final country reports in 2014.⁴ Mapping Digital Media is primarily a series of country case studies.⁵ The lack of

² See, for example, James Murdoch's Mactaggart Lecture to the 2009 Edinburgh International TV Festival at <http://www.theguardian.com/media/2009/aug/28/james-murdoch-bbc-mactaggart-edinburgh-tv-festival>.

³ Hanretty's survey takes very little account of the PSBs of Central and Eastern Europe.

⁴ See <http://www.opensocietyfoundations.org/projects/mapping-digital-media>. The author of this article was a member of the editorial commission, whose responsibility was to design the methodology and research template for country researchers and review data and reports. A longer version of this article has been published as part of this series. Cases were selected on an ad hoc basis to include the largest countries and those where media policy is undergoing the most rapid change. A full list of countries analyzed in the MDM study can be found at

comparative research in this field is perhaps due to the many methodological problems faced by comparative policy research on the basis of available data. The study encountered the following problems:

1. Comparability of data. Media use data are collected in each national media market according to different standards and definitions, because data are generated domestically, usually for valuing advertising. Furthermore, methods are unstable over time.
2. Selectivity. Research of this type involves subjective interpretation and selectivity on the part of the researcher. Making generalizations on the basis of a comparison of country reports therefore risks building castles on sand. There are three stages of selectivity: of the producer of the research template, the country reporter, and the comparative analysis.⁶
3. Lack of availability of data. In many countries, particularly in developing countries, the data are simply not available. MDM reporters were encouraged to be pragmatic and use whatever reliable data were available to create a general picture.

Despite these challenges, MDM findings can be employed to useful effect for:

1. Generating hypotheses
2. Rejecting hypotheses (if a number of cases seem to be exceptions to them)
3. Giving provisional support to rules of thumb and qualitative insight about directions of change, best practices, institutional games and structures with potential tactical and strategic value to policy advocates
4. Combining with data from other sources to add weight to claims and identify potential causal mechanisms
5. Making intracountry comparisons. Within a country setting, for example, an assessment can be made of whether, over the time period of the study, output or audiences have increased, declined, or remained stable.

What the MDM data cannot do is provide conclusive support for any causal hypotheses or general theories that link digitization and state-administered or public-service broadcasters. The data focus on what has occurred during the period of digitization, but this study does not attempt to separate that process from the many other transformations that are occurring in parallel—notably transitions from

<http://www.opensocietyfoundations.org/projects/mapping-digital-media>. On this basis, this article makes claims about global and regional trends. (Throughout this survey article, the Mapping Digital Media country reports are cited in the abbreviated form of “MDM [country name]”.)

⁵ On the logic of comparative and case study research, see Skocpol (1984) and Yin (1994).

⁶ The country studies were prepared on the basis of a common template containing three types of questions: (1) those that required comparable quantitative data, (2) those for which data sources were suggested but direct comparability unlikely, and (3) subjective assessments. The MDM data on SA/PSB contained only type (2) and (3) questions and therefore do not provide quantitative support for comparative claims.

authoritarian rule and the economic crisis and from reflexive reactions to these various transitions, such as this study. Most of the theses examined in the next section cannot be confirmed or rejected on the basis of MDM findings, but the data may lead us to be skeptical about some, lend support to others, and help us develop a more nuanced account.

This article therefore is concerned with five key assumptions and hopes of commentators concerned with SA/PSM and the transition to digital: (1) that the transition has led to a collapse in the audience, (2) that revenues have declined, that (3) the remit is being watered down in a commercial environment (4) that the basic legal and regulatory institutional setting for SA/PSB is in crisis and, finally (5), that the digital transition encourages state-administered broadcasters to become independent PSBs. These theses are all derived from the theoretical literature referenced in each section. The ambition is to examine the qualitative evidence provided for them by the case studies in the selected country chapters as well as additional secondary data.

Five Theses on SA/PSB and Digitization

1. *The audience for state-administered/public-service media is in decline.*

As access to new services expands, many argue that SA/PSB inevitably suffers audience losses, particularly among the young. International comparative research confirms that viewing of publicly funded channels has declined as a proportion of total television viewing between 2009 and 2011 in the United Kingdom, France, Germany, Italy, Spain, Russia, and India (Ofcom, 2012, Figure 3.38). Some MDM reports, which focus on the period 2005 to 2010, identify the rise of new digital channels in competition with PSB as directly responsible for audience declines (see, e.g., MDM Slovakia, p. 27).

Audience decline is neither rapid nor inevitable. MDM data indicate that there are some places—Canada, Australia, and Sweden—where SA/PSB audiences did not decline between 2005 and 2010. Even in these countries, however, there is an indisputable longer-term trend of decline in the relative share of broadcast audience of SA/PSBs, which appears to be exacerbated by digitization.

The data do not permit us to attribute audience declines solely to digitization. In Turkey, for example, digitization coincided with the end of SA/PSB monopoly. This led to a rapid decline of audience for the advertisement-funded SA/PSB between 2005 and 2010. The precipitous decline in the SA/PSB audience in Turkey and Bosnia and Herzegovina, however, contrasts with the gradual decline in most other countries with significant PSBs.

In some countries, SA/PSM experienced audience growth: Argentina's Canal 7 (from a very low bottom in the 1% to 2% range) has increased its audience. However, this growth is due to the channel's acquisition of soccer rights rather than a sudden popularity of public-service journalism. In Armenia, the state-administered broadcaster H1 maintained—and, to a certain extent, increased—its audience in the last decade. In China (where TV ownership and audiences are rising), all five of the top-rated TV news programs and indeed all major national television channels are broadcast by the state-administered China Central TV, which remains the only truly national broadcaster in China.

Ample evidence suggests that a well-run, trusted PSB can thrive even during periods of audience fragmentation. MDM Estonia reports that the PSB ETV has managed to maintain audience shares of around 15% and improve audiences in some demographic groups such as the more educated. In the longer term, audiences have declined somewhat with increasing competition since the 1990s, as ETV has dropped more populist programming such as game shows to focus on public-service programming (MDM Estonia, pp. 27–28). Conversely, where the PSB is less trusted and the PSB is a government propaganda mouthpiece, as is the case with RTM in Malaysia, audience declines have been seen as an opportunity for commercial competitors who seek to improve their trust with the audience (MDM Malaysia, p. 38).

MDM reports do show that some decline of audience share and reach on broadcast platforms is almost universal for SA/PSBs. A limited exception is found in countries where access to television broadcasting is still rapidly expanding, such as Morocco—though even here, audiences for the PSB have declined as a proportion of total television audience (MDM Morocco, p. 25). Even where PSB channels are in decline relative to other broadcasters, the rise in television viewing per viewer per day in most countries means that more PSB television is being viewed in absolute terms. This applies to most European markets, though multiscreening (simultaneous use of several media) must be taken into account.

Even where audiences for PSB channels remain high, viewers may be watching less PSB remit content. Tambini (in Tambini and Cowling, 2004) observed that audiences tended to migrate away from PSB remit programming as channel choice expanded during the digital transition (see also Just & Puppis, 2012, p. 364). But some SA/PSBs have large audiences on new platforms. The MDM reports reveal a divide between those PSBs able to mitigate audience decline on their main channels by launching new digital services and those still reliant on traditional platforms. Although individual channel audiences are declining, the launch of new channels (many of which have lower PSB obligations) compensates. France Television, for example, has not launched new channels for Digital Terrestrial Television (DTTV). but it has made France 5, a 24-hour channel, and launched a new information service using DTTV. In general, audience declines are much less pronounced in radio thus far, although radio switchover may change this.

In some areas where SA/PSB numbers are down, new services provided by SA/PSBs such as mobile, online, and on-demand have compensated. There appears to be one group (many European countries, such as the UK) where online services are compensating and another group where PSBs are not able to launch new services in digital media. NHK in Japan, for example, has been tightly constrained to broadcasting and broadcasting-related services and has limited online offering (MDM Japan, p. 30).

2. *PSM funding is in decline.*

It is widely assumed that, as a consequence of declining audiences, the revenue of PSB channels has been in decline all around the world. Many have seen the end of receiver license fees as an inevitable result of audience decline and digitization: “The principal funding source for public service broadcasters—the license fee—will not survive for long unless it is radically rethought” (Open Society Foundation, 2005, p. 41).

As digitization progresses, a more complex picture is revealed. Expressed as a proportion of overall television revenue, the role of public funding varies extremely widely: from zero in China (where funding is not transparent, but state-controlled CCTV is 100% funded by advertising) to Japan (which raises US\$8–9 billion in license fee revenue per year) (MDM Japan, p. 61; see also MDM reports, Section 6; Ofcom, 2012, Figures 3.1, 3.18).

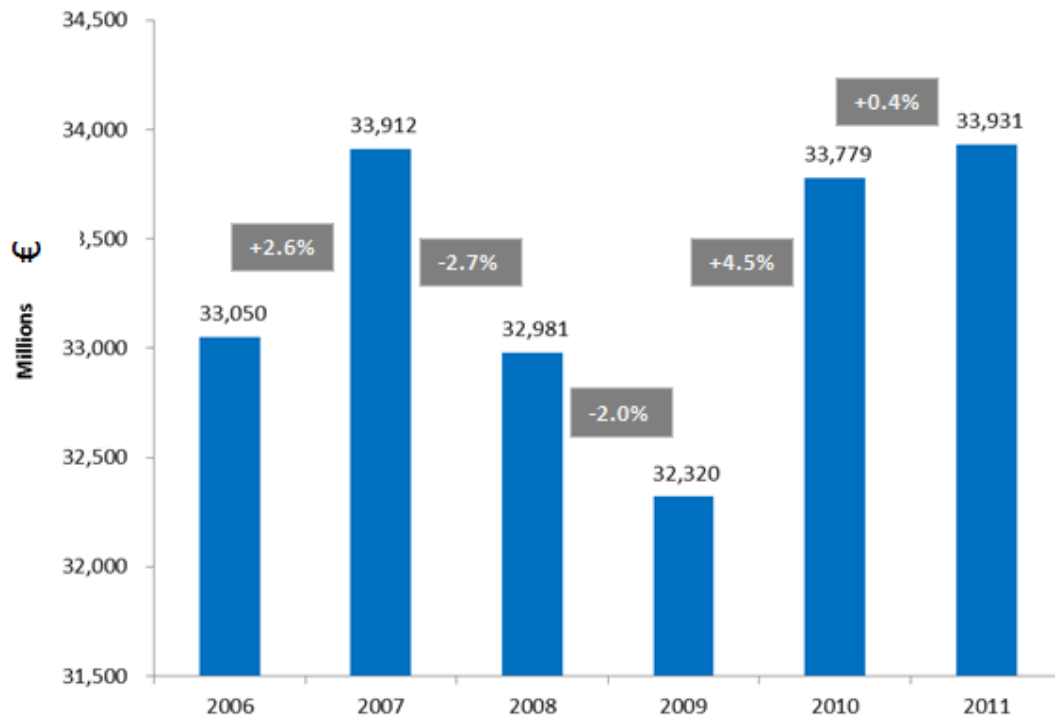


Figure 1. Public service media total funding in the European Broadcasting Union Area (2006–2011). EBU data provided by Roberto Suarez Candel. Data are drawn from 54 organizations in 2006 and 52 organisations from 2011. From Open Society Foundation (2014). *Digital Journalism: Making News, Breaking News*. Mapping Digital Media Project. New York, NY: Open Society Institute.

Figure 1 illustrates the overall level of PSB revenue in the 39 member countries of the European Broadcasting Union. The overall funding level of PSBs did not decline, but remained stable over the period 2006 to 2011.

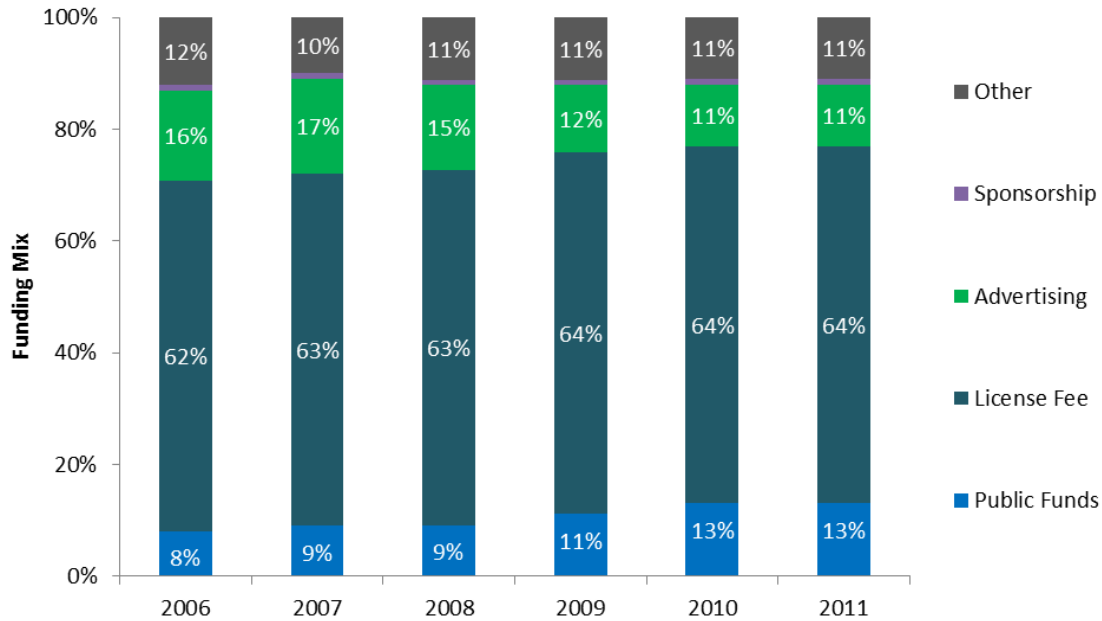


Figure 2. Public-service media funding mix in the EBU area (2006–2011). Source: *EBU Media Intelligence Service, 2013. From Open Society Foundation (2014). Digital Journalism: Making News, Breaking News. Mapping Digital Media Project. New York, NY: Open Society Institute*

Although overall revenues have been static, the balance of revenue types has changed. The EBU research shows a slight shift of PSB funding from advertising to license fees and other public funds. In part this reflects the removal of advertising funding from public-service broadcasting in France, and in part it reflects the crisis of advertising funding, which is more sensitive to audience losses and the overall economic environment. Advertising funding for PSB is vulnerable. In general, the digital transition has seen increased volatility of PSB funding (see Kleis Nielsen & Linnebank, 2011; Ofcom, 2012, Figure 3.18).

PSBs in smaller and poorer markets—for example, Moldova, Macedonia, Montenegro, Slovenia—have always faced particular challenges because of the difficulty of maintaining the high per-capita revenues necessary to fund quality services. But even with smaller markets, the story is not one of universal decline. SA/PSBs in Moldova and Bosnia have gained in both audience and funding in recent years (MDM Moldova; MDM Bosnia and Herzegovina).

A combination of austerity and an aversion to state funding programs creates new risks for some funding models. In Africa, in particular, where state and public broadcasters have relied heavily on direct government grant and other forms of direct funding, “the adoption of new economic policies, which favor reduction or the elimination of subsidies to state linked enterprises mean that state grants will no longer be necessarily available” (Mbaine, 2003, p. 157). This political and ideological opposition to state-aided broadcasting comes alongside the impact of the economic crisis and pressure on public spending, but the data just reviewed suggest that commercial advertising models have suffered more than taxation or license fee funding. According to Papathanassopoulos and Negrine (2010, p. 144), “As a result of the economic downturn we may be entering a period when the British duopoly model triumphs: a strong public sector and a strong(ish) commercial sector.”

MDM reports show no overall pattern in the ratios of public to private media funding and revenue levels between 2005 and 2010. It is not appropriate to base inter-country comparison on this data, because how data were gathered varies between countries (some include state advertising, for example). However, pooling the data does provide a useful indication of change over time. In many cases, public funding has fallen in absolute terms during this period of spending cuts, and in others it has remained constant. Commercial broadcasters have also experienced revenue declines, particularly in advertising-funded services. The Ofcom data (see Figure 3) therefore mask considerable country-level variation.

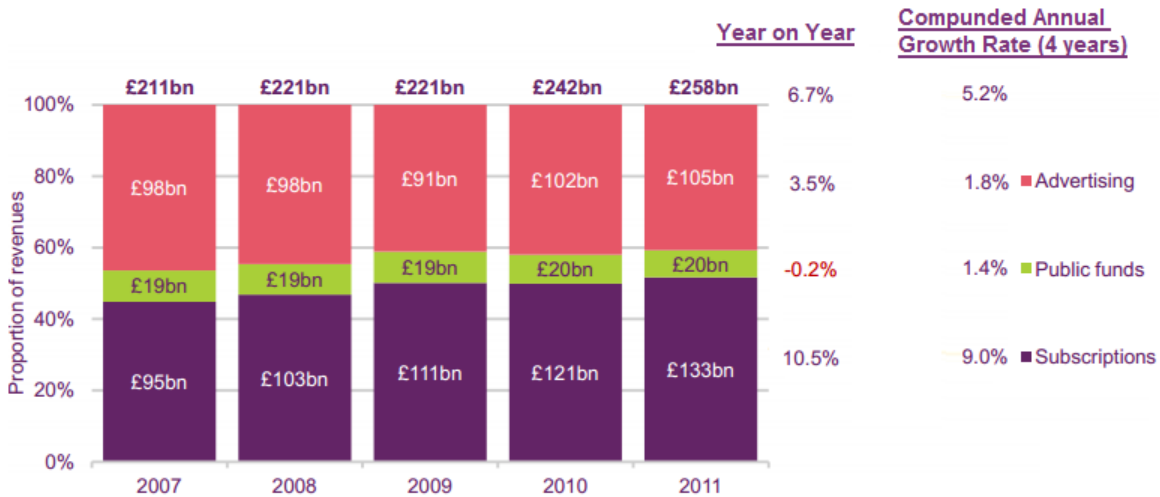


Figure 3. TV industry Revenues, by Source, 2007–2011. Ofcom analysis based on data taken from PricewaterhouseCoopers Global Entertainment and Media Outlook 2012-2016. UK revenues are based on a selection of 54 countries worldwide from the PWC Outlook research. Details on countries can be found at <http://www.pwc.com/gx/en/global-entertainment-media-outlook/territory-segments-digital-forecast-overview.jhtml>. Source: Ofcom. (2012). International communications market report. London, UK: OFCOM.

Although global figures suggest continuity in ratios of public (license fee and taxation) and commercial (advertising and subscription) revenues, some countries have experienced more radical shifts. In South Africa, public funding shifted from 39% of the total funding in 2005 to 51% in 2010, whereas in Georgia it shifted from 15% to 32%, and it also increased in Russia. In Moldova, in contrast, it decreased from 19% to 13% over the same period.

These apparent jumps in funding can be explained by one-off payments to enable PSBs to cope with extra expenditure and advertising revenue losses due to digitization rather than any long-term shift in commitment to public funding. It is also the case that flows of funding to broadcasters may increase for political reasons when elections are approaching.

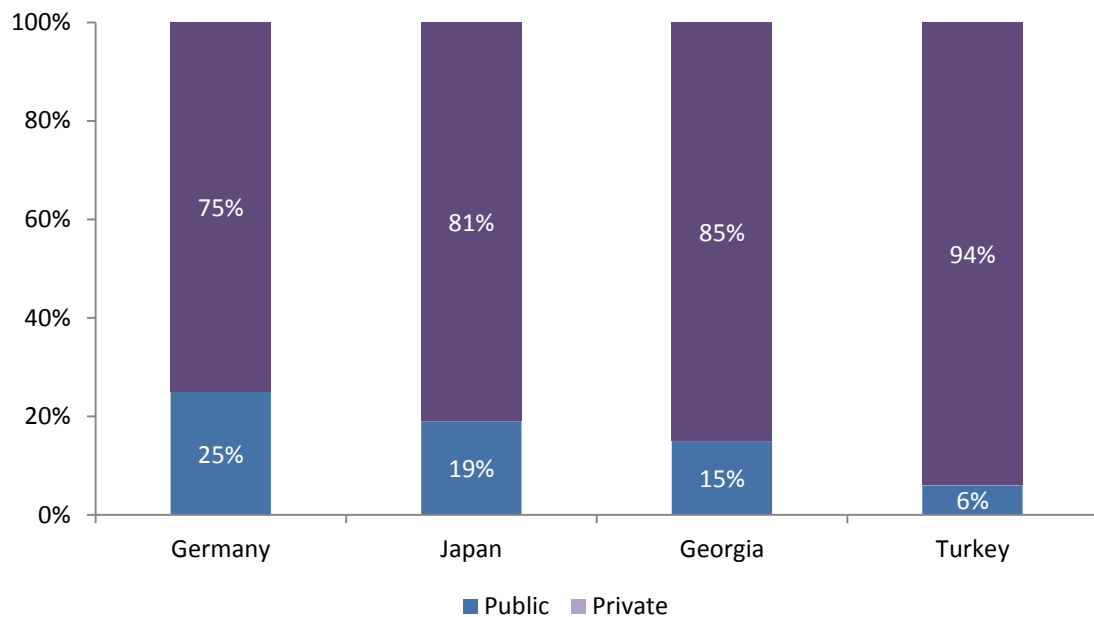


Figure 4. Evolution of the public-private ratio of funding in selected countries, 2005. From Open Society Foundation. (2014). *Digital Journalism: Making News, Breaking News*. Mapping Digital Media Project. New York, NY: Open Society Institute.

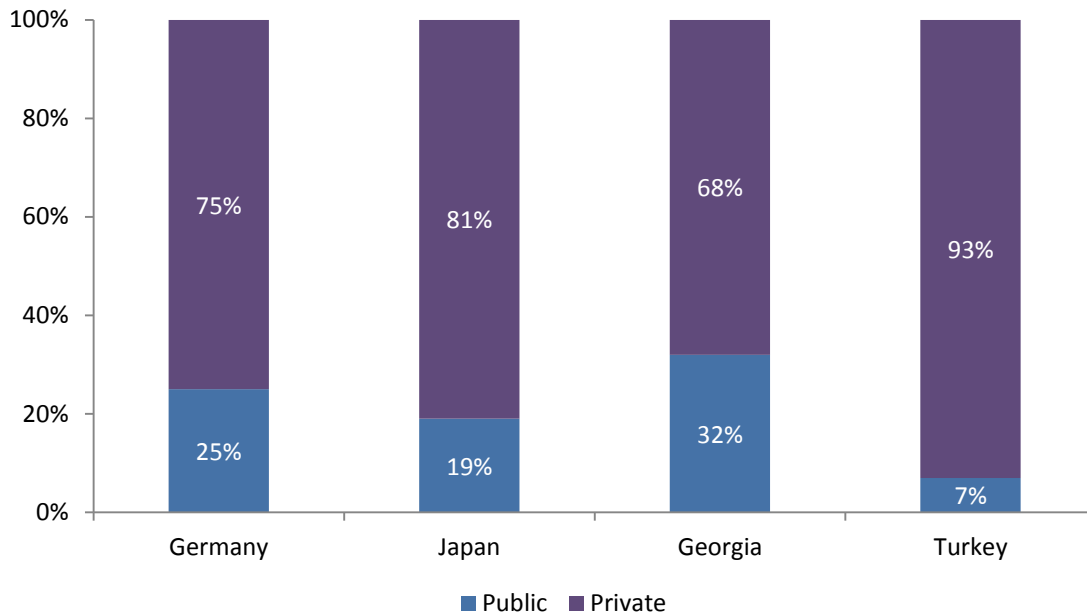


Figure 5. Evolution of the public-private ratio of funding in selected countries, 2010. From Open Society Foundation. (2014). *Digital Journalism: Making News, Breaking News. Mapping Digital Media Project*. New York, NY: Open Society Institute.

In summary, although a slight relative decline in the funding of PSM occurred, with some PSBs even reporting a PSB funding crisis (Slovakia, South Africa, and Poland), public funding does appear in absolute terms to be a relatively robust funding source, fluctuating less than advertising. The funding settlement is more complex than these direct forms of revenue, however, and a longer-term assessment should take into account tax policy and spectrum as indirect support.

SA/PSB funding reform inevitably raises questions about independence: A shift from license fees to government subsidy (see MDM Germany; MDM Netherlands; MDM Spain) may be a threat to independence. But the shift to direct government funding does not lead directly to threats to independence. Broadcaster independence can be questioned even where there is funding via a license fee. Recent crises at several European PSBs such as the Greek PSB and the Valencia PSB (see Crusafon, 2013) illustrate the potential for funding crises and reform to undermine independence and the difficulty of executing reforms without threatening independence. New forms of licensing (e.g., levies on telecommunications companies and direct grants from government) could create more problems for PSM independence than traditional viewer license fees and advertising, but they may be the only option if the goal is to secure public-service alternatives to commercial media.

3. *The remit for state/public media is contested, and standards are under threat.*

MDM reports show that PSB remits fall into three categories:

1. Those based on defined genres of content (for example, impartial news, information, educational programming), as in Thailand (MDM Thailand, 2010, p. 27).
2. Those based on social functions of the broadcaster(s) such as serving citizenship (e.g., Peru, Egypt, and Germany).
3. Those based on general values and/or fundamental rights (e.g., Romania).

Most are hybrids of these types (MDM USA, p. 39), and none are easy for regulators to measure. With lack of clarity come political discretion and challenges to independence. State broadcasters, in contrast to PSBs, do not tend to have a public statement of remit and responsibilities, but they are subject to authority and accountable to political power.

MDM reports confirm the following pressures and trends:

1. Increased commercial competition leads to pressure to meet the demands of audiences and advertisers rather than the pursuit of cultural or educational objectives.
2. Digital innovation undermines remit definitions that are based on broadcasting technologies and raise questions about whether public service has a role in new media.
3. These and other trends call into question the institutions responsible for monitoring and enforcing the remit.

Historically, both state-administered and public-service broadcasters pursued ideological goals before market demand. With digitization and increased competition, they find it necessary to provide more attractive content to secure an audience. This leads to a catch-22: SA/PSBs need to compete with commercial media, but as a result, they are accused of populism—providing content indistinguishable from that of commercial competitors and watering down their propaganda or public-service remit. If, on the other hand, SA/PSBs choose to remain closer to their propaganda, cultural, or educational remit, this might lead to perceptions that they are dull and old-fashioned, further compounding the audience crisis.

This section focuses on public-service rather than state-administered broadcasters, because the catch-22 is more of a threat to them. According to Beckett (2008):

There is a danger that public service journalism will effectively become a rump financed by the world's more welfarist governments, like the railways in post-war Britain or the postal service in Italy—dull, inefficient, out of touch with the latest technological developments, and servicing an ageing sector of the public. (p. 37)

This prospect has led other experts to ask: "In a system characterized by market competition and audience fragmentation, what is the distinctive contribution of the public service provider?" (Kuhn, in Iosifidis, 2010, p. 168). This question was identified as key as long ago as 2002, when a report commissioned by the BBC analyzed how different PSBs around the world were choosing between distinctiveness on the one hand and market share on the other (McKinsey, 2002, pp. 4, 22). A 2013 repetition of the study found that PSBs create a "race to the top" whereby the PSB sets a benchmark and raises the quality threshold for the market as a whole (Simon, 2013).

In response to this, the PSBs described in MDM country reports often perform a balancing act, both observing the remit and attempting to be attractive to audiences, with limited success: A focus group study in 2010 (MDM Thailand, p. 26) found that some Thai viewers struggled to distinguish the output of the independent PSB from that of the state broadcaster. Elsewhere, as in Italy, commentators have criticized PSBs for output indistinguishable from that of commercial broadcasters (MDM Italy).

Digital innovation also poses the question of whether the remit of public-service media should extend beyond broadcasting. Many commentators have argued that digitization should lead to the evolution from public-service *broadcasting* to public-service *media* or public-service *communications* (Iosifidis, 2007, 2010; Jakubowicz, in Klimkiewicz, 2010; Tambini, 2004). However, Priebs (2004) found that in Germany and Japan, restrictive remits and regulations limited public-service activities to broadcasting and broadcasting-related services and acted as a restraint on the launch of new digital services by the PSBs (ZDF and NHK). According to Brevini (2010), the Italian PSB RAI spent only 0.2% of its total budget on online services, in comparison to the BBC spending of around 5%.

In many MDM countries, the debate about PSB remits in the digital age is ongoing, and there is no consensus about new roles and rationales in the online space. Director of the BBC Mark Thompson argued that the PSB should seek to serve sub-audiences as the "new tribes" of PSM users, and do so on all potential new platforms as "martini media," which are accessible any time, any place, from anywhere (Thompson, 1999, cited in Price & Raboy, 2003). But other PSBs, particularly in smaller markets, have retrenched to their core PSB mission and the defense of smaller national identities in the face of globalization (MDM Estonia, 2013, p. 27).

MDM reports show that a large and growing number of countries apply some general public-service obligations to all broadcasters (e.g., Italy, Brazil, Chile), but these general requirements have not been effectively enforced. Often they do not apply to new channels and online services, and there is often a lack of clarity regarding how public-service obligations apply to DTTV services. In many markets, all licensed broadcasters must ensure that news is impartial, but the extent to which these obligations apply to digital platforms is yet to be resolved in most countries. As an example, the UK public-service broadcasters Channel Four and ITV should under the Communications Act 2003 also seek to promote

public-service principles through their services. However, the shift to digital has involved an ongoing loosening of these obligations in negotiations with the regulator over license terms.

In Chile, the Law of Correct Operation of broadcasters in theory applies a set of public-service principles to all broadcasters. The regulator has the responsibility to ensure that broadcasters of television respect “the Nation’s moral and cultural values, dignity of persons and protection of the family, for pluralism; for democracy; for peace; for the protection of the environment; and for the spiritual and intellectual formation of children and the youth” (MDM Chile, p. 41). In general, this form of principle-based regulation has not been successful. Vague aspirational principles are difficult to enforce, and if they were enforced, it would be regarded as an attack on broadcasting freedom.

The reports confirm that the PSB catch-22 is undermining PSB innovation. For example, surveys of perception of the public-service broadcasters in Thailand (MDM Thailand, 2010, p. 26) and Germany (MDM Germany, p. 29) indicate that they are perceived as somewhat dull and old-fashioned. Most PSBs are experiencing difficulty reaching younger audiences. There is a need for a policy decision if this is the case: If the view is that a mixed broadcasting system of PSB and other commercial channels is a long-term goal, then it may be necessary to relax genre-based remits to create more popular broadcasters (see MDM Germany).

It is possible to identify a few options regarding the PSB remit:

- Uphold the remit. The PSB can focus on core PSB remit programming such as news, education, and culture. Few have chosen this route, though some (such as Estonia) have adopted this pure PSB approach.
- Dilute the remit—and risk undermining PSB privileges such as the license fee in the long term. Some evidence suggests that there is less news provided as part of the remit in Sweden and Egypt, for example. Quality public-service news is one of the most expensive genres to produce, and several MDM reports highlighted tendencies to cut and paste news as a cost-cutting approach.
- Develop a new remit—for example, by updating it to permit the launch of new online, mobile and on-demand services. The policy debate about the role of public service and innovation in the new world has been dominated by a discussion of crowding out of commercial by publicly funded services rather than a discussion of what the public interest demands in the new digital environment (Barwise & Picard, 2014; Simon, 2013). New, updated remits have been outlined in many European countries, and even in Germany and Japan a remit more conducive to public-service innovation has been agreed upon (see, e.g., MDM Sweden, p. 26).
- Change the enforcement and monitoring framework, including who is subject. There are several instances of advertising-funded public-service broadcasters exiting the public-

service system (Sweden's TV4, for example). In Europe, in particular, state aid regulation increasingly requires a clear and consistently applied remit (Levy, 2012).

In countries where there is political will for a managed transition to post-broadcasting PSM, a number of these options were pursued. The Swedish commercial PSB TV4 has effectively ceased to be a public-service broadcaster, but the main PSB has been permitted to launch new online services after a government commission concluded in 2010 that "public service internet activities were legitimate and should aim at reaching as many people as possible" (MDM Sweden, p. 26). Where established PSBs have been able to develop a compelling PSM offer in new platforms, the PSM provider is among the biggest providers of news. In the United Kingdom, for example, the BBC leads on some platforms, and in Spain RTVE is the second most visited site. In other cases—for example, in Japan and, to a certain extent, Germany—regulation has prevented the development of public service on new platforms.

In an international context, there is some evidence of policy learning between countries and the emergence of global norms regarding the remit of PSB/PSM. For example, where the PSB mission is codified in law or regulation, there are some family resemblances among those mission statements. The list of principles of the broadcasting service in Peru, for example (MDM Peru, pp. 30–31), bears a strong resemblance to similar principles in Germany and the United Kingdom. More research is necessary to ascertain whether an international convergence with regard to the PSB mission was taking place.

4. Digitization undermines the traditional regulatory toolkit for SA/PSM.

Digitization has led to a fundamental rethinking of how SA/PSM should be funded and regulated. France and Spain have seen important legal changes with PSBs (e.g., RTVE) not being permitted to carry advertising. Elsewhere, as in Sweden, public-service obligations on some broadcasters have been relaxed. Despite attempts at standardization, there is no universally accepted definition of public-service broadcasting.⁷ Table 1 outlines the range of institutions and structures underpinning broadcasting governance in the MDM reports as ideal types.⁸

⁷ International organizations including UNESCO, the Council of Europe, the European Commission, and the United Nations Development Programme have developed several declarations and principles on public service broadcasting. See Council of Europe, Committee of Ministers (1994); European Commission (2009); and the list of resources noted in United Nations Development Programme Bureau for Development Policy (2004). According to the UNESCO Media Development Indicators (UNESCO, 2008), "PSB is broadcasting made, financed and controlled by the public, for the public. . . . It is free from political interference and pressure from commercial forces." An ISO standard for public service broadcasters, ISO 9001, also has been used to accredit a few broadcasters (see Cheneviere, 2009; www.iso.org/iso/livelinkgetfile-isocs?nodeId=15354090).

⁸ The institutional basis of media governance has been described by Puppis (2010) and Donges (2007). This article develops this approach stressing the importance of legal and regulatory relationships within a social compact of privileges and duties (Syvertsen, 2003; Tambini, 2012).

Table 1. The Public-Service Media Compact.

Framework type	Content accountable to	Rights	Duties	Examples of broadcasters
State	Government	Funding, access to distribution, must-carry rules, Electronic Programme Guide (EPG) prominence, monopoly	Propaganda, universal availability, fundamental rights, protection of minors	CCTV China
Public service (PSB)	Public as citizens, parliament	Funding, access to distribution, must-carry rules, EPG prominence	Public-service remit, universal availability, fundamental rights, protection of minors	STV Sweden
Commercial PSB	Consumers, shareholders, regulators	Funding, access to distribution (on terrestrial), must-carry rules, EPG prominence	Public-service remit, universal availability, fundamental rights, protection of minors	ITV UK
Commercial	Consumers, shareholders	Basic speech rights, fair competition, access to distribution (at commercial price)	Fundamental rights, protection of minors	TV Globo Brazil
Other: public news agency, subsidized press/media	Consumers, regulators self-/co-regulation councils/ shareholders	Funding, oligopoly/ monopoly/access to news	Obey law, self-regulate	Agerpres/ Mediafax Romania Schibsted/ Aftonbladet Sweden

Note: Based on Mapping Digital Media reports, 2013.

The top row in Table 1 outlines the position on state broadcasting, and the other lines describe various forms of PSB and commercial media. The precise arrangements for these key institutional relationships and the relative importance of them in the power relationships between governments/parties and broadcasters are subject to volatility and redefinition during the transition; in particular:

- Broadcast/spectrum licensing may become less important as services move online and on-demand.
- Decisions on whether the PSB should be permitted to launch new services become more important to the long-term survival of the PSB.
- Competition rules and their application to the PSB are more contested and increasingly impact questions of the remit of PSBs.

- New forms of intervention, such as net neutrality rules, access requirements, and must-carry rules, can be provided in support of public service.

The value of spectrum as an informal subsidy of public-service activity should theoretically decline as alternative distribution channels open. With the rise of alternatives to terrestrial broadcasting, the value of these licenses declines, but there is a huge uncertainty about rates of decline. With the rise of mobile services, there is pressure on governments to reassign spectrum hitherto used to deliver public-service media—for example, the UHF bands previously used for terrestrial television broadcasting.

The impact of clearing terrestrial spectrum of PSB varies, because many broadcasters have no, or weak, PSB obligations. All MDM country reporters were asked to consider the level of public-service obligations on commercial operators. Although country reporters mentioned few formal public-service obligations on broadcasters, there are a number of instances in which the constitution categorizes some or all broadcasters as services of public interest rather than as purely private organizations (MDM Brazil, Section 2.2.2). These legal requirements, which sometimes include obligations to broadcast public information in emergencies, are often seen as endangering the independence of PSBs and can be a source of tension and mistrust. This was often the case in the Latin American context—for example, in Brazil (MDM Brazil) and Guatemala (MDM Guatemala, Section 2.2.2.).

In many countries, commercial PSB is an alien concept.⁹ Where there are general licensing requirements for broadcasters to meet minimum public-interest requirements, one interesting finding of MDM reports is that in some countries these apply only or principally to the digital terrestrial platform, and such obligations are either diminished or absent on new platforms, including digital terrestrial. Broadcast licenses in terrestrial TV frequencies are the main vehicle for this “spectrum for service” deal. These licensing obligations often are not adequately enforced, and the potential for leveraging funding for PSB in this way is clearly in decline on evidence from MDM reports.

In Europe, the remit dispute has led to the creation of the so-called public value framework whereby PSBs must prove that new services contribute to the public interest before they can be funded in accordance with EU competition law. Several of the correspondents expressed concern that public value tests may undermine the PSM in the long term (e.g., Sweden). They raised concerns about effectiveness (Germany), objectivity, and cost of implementation (UK until 2006). Although a transparent framework that sets out the evidence base for a decision to grant or refuse permission for an independent broadcaster to launch a new service is in principle good for PSB independence, public value tests are not objective.

In 2003, Syvertsen remarked that digitization of television “continues to decimate the array of privileges that governments have at their disposal to grant to selected broadcasters” (2003, p. 160). Whereas SA/PSBs enjoyed privileged access to consumers in the form of monopolies and privileged spectrum access, in the new digital environment they have weaker distribution privileges and have to

⁹ See the various reports, Section 2.2.2. Many vague formulations of general responsibility of commercial broadcasters exist, but these are rarely enforced (see, e.g., MDM Russia, p. 29).

compete with commercial media. Commentators (Collins & Murrioni, 1996; Ofcom, 2004) have argued that the commercial PSB sector has been particularly vulnerable during the process of digital switchover. The MDM reports confirm that the basic compact of public-service media is indeed under threat in many countries, but also state that with political will some aspects of it may be possible to maintain.

The complex balances of regulatory assets applied to public-service media do not apply to state media in the same way. The MDM reports show that state-controlled broadcasters are more likely to be free to launch new services (e.g., Nigeria, Kazakhstan), whereas independent broadcasters face controls and restrictions.

5. *State-administered broadcasters are undermined by the digital transition, creating demand for independent PSBs.*

The digital fairy tale of media reform activists is: Once upon a time, a state broadcaster suffered audience collapse in the context of rising digital competition. This inevitably led to demand for more diverse, independent news and an irresistible groundswell of pressure to either reform the state broadcaster into an independent public-service provider or create a new PSB.¹⁰

Unfortunately, the MDM reports provide little evidence that the fairy tale is true. Such a view assumes that viewers will actively seek out new sources of independent content. In practice, audiences may stick with a state broadcaster even when there are other choices, and even if they do migrate to other services, private broadcasters are likely to be captured by some interest group or another.

The MDM reports are not universally pessimistic, however. Although no direct causal relationship exists between digitization and PSB independence, it appears that the introduction of commercial competition has led some viewers and listeners to become less trusting of PSB and state broadcasters because they are exposed to a wider range of views, opinions, and professional standards. In Jordan, audiences for state-controlled JTV news have dipped below 50% of the TV news audience since 2008 with the rise of satellite TV. In Estonia and Thailand, increased demand for public-service material was reported, but such demand is weak and may not lead to financial sustainability for PSM. Citizens may continue to mistrust information provided by public broadcasters if they have a history of a lack of independence or view remit programs as boring or worthy (e.g., MDM Thailand, p. 26).

So it is understandable that many continue to hope that digital choice will lead audiences away from state-controlled media. However, of 43 of the MDM countries studies where reliable data could be found, 32 of the SA/PSM providers appeared in the top five most used sources of news (see all MDM reports, Section 1.3.1). Even where the PSM providers were state controlled, they remained among the

¹⁰ This is a somewhat simplified summary of the optimistic position of some media reform activists. Most are less naïve; see, for example, Smith (2012).

most used news providers.¹¹ Of 19 countries where data were available and the broadcaster was clearly state controlled, 14 were among the five most popular sources of news, and there were only five instances in which the broadcaster was clearly state controlled but failed to appear among the list of most used news sources. States apparently have not lost control of distribution to the extent that users are moving decisively away from state broadcasters to more independent sources of news. It is also likely that sport and premium content, rather than quality, independent news, drives audience. Independence of the PSB seems to have made little difference. In the 14 countries where PSM were identified as clearly independent, they were more likely to appear in the list of most used news sources (12 countries) than not (2 countries).

In many regions outside the PSB heartlands of Europe—in Kazakhstan, for instance—PSB is simply not understood as a concept, and digitization has brought no pressure for reform. The South African PSB SABC is somewhat independent, but Africa contains a number of rapidly developing media markets that tend to have state-administered media of limited independence from the state and a large proportion of foreign public funding (see also Panos Institute, 2012). In Nigeria, for instance, the federal broadcaster is involved in a joint venture with Chinese state media (MDM Nigeria, p. 31). The continent also contains the countries with lowest gross domestic product per capita, with lowest TV and radio penetration and the most distant digital transitions. The SA/PSB in Congo, for example, is poorly funded and is not available over the whole territory of the country (see AfriMAP, 2013).

But there are pressures and opportunities for change. In almost all the markets studied, many consumers have gained access to new services in the last decade due to digitization. In only a few cases (e.g., MDM Kazakhstan; MDM Pakistan, p. 29) have regulators successfully excluded new broadcasting channels from terrestrial spectrum during the digital transition. But even in Pakistan, new broadcasting entrants on other platforms have put some pressure on the dominant state broadcaster. This is not an isolated case: Malaysia (MDM Malaysia, p. 38) and Kenya (MDM Kenya, p. 30) provide examples of new entrants leading to significant pressure for reform of state-administered broadcasters.

MDM reports thus show that, although digitization has not broken state broadcasters, it may have undermined them. In particular:

- Where state broadcasters are captured by particular political interests, audiences tend to decline as digitization makes alternative sources more widely available.
- In an environment of intense competition for audience from not only television but other platforms such as the Internet and mobile, PSBs and state broadcasters both tend to lose audience (with some exceptions, such as Chile and Argentina).

¹¹ A researcher was asked to code the reports according to whether country reporters gave a clear indication of whether the public-sector broadcaster was categorized as (1) state administered, (2) independent public service, or (3) hybrid or transitional. This was checked against main nongovernmental organization reports such as Freedom House and Reporters Without Frontiers.

- The PSB can at that point become a pressure group for editorial independence, particularly if it is suffering a revenue decline and job losses.

Public broadcasters face uncertainty and a need for political agreement on a renewed statement of purpose as well as transitional funding if they are to survive the digital transition. There is a need for a clear publicly debated restatement of the desirability of the mixed system and the necessity of public-service media in the digital age. In most countries (especially Moldova and Japan), such a debate has not taken place outside of narrow technical circles.

The proven ability for state broadcasters to (1) maintain broadcasting share and (2) transition dominant positions into the online environment shows that independence is not the only or even the best way to guarantee audience. More analysis is necessary to understand the detail of audience shifts during the transition, but if state broadcasters are in a position to monopolize talent and premium content such as sports rights they may be able to use this influence to maintain news dominance.

Where there is widespread public awareness that broadcasting content may be captured by political interests, digitization and choice may increase pressure on the PSB to become more impartial. For example, in Italy, Romania, Malaysia, Georgia, Kenya, and, to a certain extent, Japan (where NHK has legally been independent since 1950), broadcasters face pressures to become more impartial.

This, however, depends on wider pressure from civil society to ensure that bodies using valuable public resources (license fees, spectrum) do serve a wider public interest and not a narrow political interest and a significant level of transparency and understanding regarding the potential for state capture. In Thailand, Germany, the United Kingdom, and Canada, for example, where the perception of PSB independence and impartiality is stronger, there is less pressure for change. Nonetheless, PSBs may be vulnerable to political pressure if they do not have patrons in power with a commitment to the principles of independence.

Some state-administered broadcasters are not under genuine pressure from new commercial competition, and they remain tightly controlled by the state. They are being permitted to launch new services to the exclusion of potential competitors. For example, in Kazakhstan, the state broadcaster has been permitted to launch new digital niche channels. These benefit from must-carry rules and have the effect of excluding new entrants from the market (MDM Kazakhstan, p. 44). Similarly, in China, CCTV has been permitted to launch new channels to the exclusion of new entrants on the dominant terrestrial platforms. As a result, while new competition has arisen in the form of regional and municipal channels, CCTV has been able to maintain a national broadcasting monopoly by launching new services in competition with its own existing channels.

In sum, digitization and increased choice does not make the decline of state-controlled broadcasters inevitable. Other considerations (for example, control of sports rights, production budgets, access to talent and celebrities) rather than public-service values likely determine demand for a broadcast service. Only where there is widespread awareness of the value of PSB independence among audiences is it likely that expanding digital choice will lead to audience migration away from state-controlled media.

The central question for national PSM is whether they can be successful in maintaining a position in a mixed communications ecology of commercial and publicly owned media. Most national governments have offered very little long-term vision and policy direction in answering the question of whether PSM are fundamentally a phenomenon of the century of analog broadcasting or whether they should be able to flourish in the new digital communications cornucopia. The MDM data offer some indication of their ability to develop in the web environment. Only in a minority of cases (the UK and the Netherlands) do the PSM appear in lists of the most visited websites. Regulatory and political constraints have clearly hindered the development of state and public-service media in the web space.

State-Administered/Public-Service Media Go Digital: Virtuous Circle or Death Spiral?

Audiences of state-administered and public-service broadcasters are declining almost everywhere. But this masks a more complex picture. On one hand, SA/PSBs in some countries have launched new services on new platforms to offset broadcast audience loss. And the content these organizations are delivering is changing, too. In the more competitive digital environment, there appears to be a move away from specific genres such as state propaganda, or public-service programming genres, to more commercial programming. Whether such developments are desirable, and whether they are permitted to occur, will depend on local conditions.

There are some cases where audience decrease, a tightening of the remit, and funding reductions create a self-reinforcing spiral of decline, and some others in which innovation and new services create a virtuous circle of reform. MDM reports observe both of these developments. Sweden could be cited as an example of virtuous reform, where a clear policy commitment has permitted public-service innovation and the PSM enjoys both independence and high levels of public support. Turkey, on the other hand, is an example where rapid audience decline and a funding squeeze are difficult to reverse amid rising public criticism. And this will not inevitably lead to more broadcaster independence. Where public support is weak, PSBs may become more reliant on political support.

The future of both state and public-service media is uncertain. Although many examples exist of successful innovation in public service, there are others where PSB is in crisis. On the other hand, despite some examples of potential pressures for increased levels of independence from the state, state-administered broadcasting seems well adapted to survive the digital transition.

Only in Europe are the institutions of independent PSM in a strong position. There, the norm of the mixed broadcasting system may be becoming more prevalent with the incorporation of state-administered broadcasters from Central and Eastern Europe into the conventional PSM model, and regulatory changes such as the Communication on the Application of State Aid Rules to Public Service Broadcasting (2009). In the Middle East and North Africa, PSB independence faces numerous challenges. The absence of the model in the rising powers of Brazil, Russia, and China makes the question of PSB in India and South Africa of great importance in global terms (see MDM country reports; Ofcom, 2012, Tables 3.16, 3.17).

All five theses have received some support from the evidence, but there is no simple deterministic outcome, and there are exceptions and qualifications that need to be noted. SA/PSB audiences do tend to decline, but what this means for audience revenue or the potential to water down the broadcaster's unique remit varies from country to country. The transition to digital calls into question almost every aspect of the fundamental social contract upon which SA/PSM is based. On the basis of the evidence contained in the MDM reports, however, it is rare to have an open and transparent debate about the policy settlement for the long-term evolution of the relationships among state, public, and media, because the policy process almost everywhere is characterized by strong and opaque links between political interests and broadcasters.

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