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# UNCERTAIN FUTURES: PUBLIC SERVICE TELEVISION AND THE TRANSITION TO DIGITAL - A COMPARATIVE ANALYSIS OF THE DIGITAL TELEVISION STRATEGIES OF THE BBC AND CHANNEL 4

**Georgina Born**

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### Abstract

Television remains the most powerful and ubiquitous medium for social communication. The advent of digital television (DTV) and the prospective convergence between television, computer and telecommunications technologies augur radical changes in the media ecology. In the context of the ensuing technological, economic, cultural and regulatory uncertainties, some analysts argue that public service broadcasting faces new threats, others that it bears new responsibilities.

1999), others that it bears new responsibilities (Graham 2000; Inglewood 2000; Born and Prosser 2001).[2] This paper presents the results of an ESRC-funded study by the author in 2001 which examined the digital television strategies of Britain's two main public service broadcasters (PSBs), the BBC and Channel Four (C4), in this period of multiple uncertainties,[3] as well as examining *how* the PSBs develop strategy in the face of such uncertainties. On this basis the study sought to compare and evaluate the strategic planning of the two PSBs, and to assess to what extent their respective policies demonstrate a revitalised role for PSB in the digital context and are likely to enhance the quality of British television. The research highlights the increasingly central role of strategy and the related disciplines of market analysis and market research in the dynamics of the contemporary media industries. While the main part of this paper relates to findings from the 2001 study, given the rapid changes in this sector, a Coda updates the analysis to the present (March 2003).

The study has two outcomes beyond the immediate analysis, which are outlined at the end of the paper. It yields major insights for public policy in this area, highlighting the problematic nature of the regulatory controls operating on C4, the contradictory policy imperatives under which the BBC in particular is labouring, and the critically important role in the roll-out of digital services played by the publicly-funded BBC. In addition the research has implications for economic sociology. It offers a case study that exemplifies recent theories of the performative role of expert discourses, and particularly forms of economic expertise in contemporary business practice. Thus far little attention has been paid by the new economic sociology and media political economy to the speculative and projective processes by which new markets, such as those being formed around digital television, come into being. This study offers such an analysis, focusing on the way strategy and marketing are deployed to conceptualise, frame and constitute future media markets.

The BBC and C4 are good for comparison. They have different funding bases (licence fee revenue for the BBC versus advertising for C4), regulatory structures (self-regulation via the BBC Board of Governors as opposed to external regulation by the Independent Television Commission for C4)[4] and audience profiles (the BBC being committed to universality, while C4 has focused in

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its website only the BBC, C4 and S4C as Britain's PSBs, while ITV and C5 are described as 'primarily commercial broadcasters [that are] required to include certain types of programming' (DCMS website, Nov. 2001).

[2] On the concept of public service broadcasting, and its contemporary redefinition, see Born and Prosser 2001.

[3] It is striking and a cause for concern that, although ITV and Channel 5 are regulated, like C4, by the Independent Television Commission according to public service criteria, the Department of Culture, Media and Sport specifies on its website only the BBC, C4 and S4C as Britain's PSBs, while ITV and C5 are described as 'primarily commercial broadcasters [that are] required to include certain types of programming' (DCMS website, Nov. 2001).

[4] C4's regulation by the ITC, given its commercial expansion, is complex and partial. C4's public service remit now applies only to the main channel. Its new subscription channels must abide by the ITC's Codes but have no public

the last decade on demographic groups attractive to its advertisers, ie higher socio-economic groups and younger audiences). They also have different remits.[5] The BBC is expected to provide services of a high standard that inform, educate and entertain,[6] offering a wide range of subject matter for local and national audiences, as well as ensuring accuracy and impartiality in its news programming and in coverage of controversial subjects. C4’s remit centres on complementing ITV through the provision of distinctive output, and requires innovation and experiment in the form and content of programmes. C4’s licence renewal in 1998 required an increased commitment to innovation and experiment, educational and multicultural programming, and to training and regional production.

The economic uncertainties facing British broadcasting include greatly increased competition, a severe advertising downturn, the threat of economic recession, and declining budgets for expanding multichannel services set against falling production costs. The year 2001, the period of this research, saw a serious advertising recession causing financial crisis among the commercial broadcasters.[7] As a result they have developed multi-revenue business models, with subscription seen as the main source of revenue growth (ITC 2001). In 2001, for the first time in decades, the BBC was secure and confident while the commercial terrestr2(i)-10.2(a)-11.2(pesTdne)11(seaceyv(t)-512

C4 had expanded too much. This study thus took in a period of reflection on the new enterprises, and the announcement in July that Jackson was to leave at a critical juncture. Two major uncertainties therefore faced C4 at the end of this study: a new chief executive, and looming recession.

The basis of the study was a series of interviews with personnel involved in strategy and policy development regarding digital television and related new services. A total of 39 interviews of between 60 and 90 minutes were recorded primarily with strategists, market analysts, market researchers and directors of new services and channels at the BBC and C4. Interviews were also carried out with other expert parties, including independent producers, regional BBC executives and ex-BBC staff (see Appendix). The interviews and their analysis addressed three main foci: the PSBs' handling of technological and industrial uncertainties; the social and cultural challenges presented by the fragmentation of audiences linked to the challenge of creating and positioning new services for DTV and related new technologies; and the economic and organisational challenges presented by the changing nature of competition, declining budgets, the need for new sources of finance, and fair trading issues.

**Channel 4: Strategies pursued, their overall rationale, and how they were developed**

In the context outlined earlier, under Michael Jackson C4 expanded increasingly in commercial directions. The channel's internet, merchandising and publishing activities grew. In November 1998 C4 launched the subscription channel Film Four, based on its long-standing film production brand, and in January 2001 a subscription entertainment channel, E4. In April 2001 FilmFour became a brand subsuming four subscription channels available only Sky digital: the original FilmFour channel, FilmFour Plus One, a timeshift version of the original channel, FilmFour World, specialising in international films, and FilmFour Extreme, devoted to controversial and extreme content in film. With the reality programmes *Big Brother* and *Big Brother 2*, huge ratings successes in summer 2000 and 2001, C4 is considered to have pioneered multi-platform programming in the UK. The second show ran in real time on its own website and at certain times on E4, with edited highlights on the main channel.[16] Both also involved 'interactivity' – the opportunity to phone in and vote for contestants – a development that continued with the spoof betting gameshow *Banzai*, which opened on E4 and crossed to the main channel.[17] To encompass the commercial services, and to mark the boundary with C4's public service activities,

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service television portfolio will consist of BBC1, BBC2, BBC3, BBC4, the pre-school and older childrens' channels, BBC News 24 and BBC Parliament (BBC 2000b). At the same time the BBC New Media directorate (rebranded BBCi) continued to expand research and development on internet, interactive television (iTV), convergent and cross-platform services and new platforms. While this study did not cover these in depth, it did look at the BBC's early experiments in iTV and broadband.

When government responded to the BBC's plans in September 2001, they were approved with provisos that the channels must have distinctive public service qualities, that existing services are not adversely affected, that they must contain a high proportion of British and European content and must involve interactivity (DCMS 2001). BBC3 was not approved as it was considered insufficiently distinct from commercial channels, but the BBC was given an opportunity to amend the proposal. In September 2002 the government approved the revised BBC3 submission, resistant viewers to digital. The BBC's overall aims with its DTV proposals were therefore threefold: 1) to respond to the government's call for the PSBs to help drive the transition from analogue to digital, and to be at the core of digital, by developing new attractive, high quality services; 2) to complemenr0.2(t)0.2(.3(o)11.1(79-42f1.2(l)-21d.-11et1.2(a)11.a0(u)-11eov)11.a7.1r)-1is.1ruoo2 take two forms: that these markets are already well supplied, and that the BBC benefits from cross-subsidies and cross-promotions between its public service and commercial enterprises in unfair ways. The complaints led competitors to argue against the BBC's plans, and for a 'level playing field' to be effected by bringing the BBC under the regulation of Ofcom in the new Bill, as well as for the stricter application of UK and European competition law.

In response to its critics, and in designing the new channels, the BBC stressed three factors that differentiate them from commercial competitors: 1) the absence of advertising; 2) that they will contain a high proportion of original British programming, for which budgets will be higher than the digital channel norm; and 3) that each channel will contain a mix of genres (including 'public service' genres such as news and current affairs), unlike the DTV norm where channels are commonly niche or genre-based. Moreover, and importantly, the precise character of the new channels was seen as necessarily open to change in response to changes in viewing.

**Key strategic rationales**

Ten variables emerge from the interview data as key strategic rationales for the new DTV channels and cross-platform services. The strategic rationales were presented discursively by those centrally involved in strategy development. They evidence both overlaps and differences between the two PSBs, the differences stemming most obviously from their contrasting funding bases, particularly in the context of the severe financial uncertainties faced by commercial broadcasters. In what follows the rationales given by executives at C4 and the BBC are summarised and compared:

**1) Increasing and diversifying revenue streams**

platforms is seen as essential for C4's health, to ensure competing buyers for the C4 brand. The prospect of C4 moving into production or distribution, if necessary to support C4's values, is seen as a possibility.

By contrast, this rationale is not apparent in BBC thinking about the new services. While some commercial spin-offs through BBC Worldwide are envisaged, they are not strategic priorities.

**2) Maintaining or increasing audience share**

In the face of audience fragmentation, in C4 the new channels are intended to add audience share; share will in future be aggregated across the C4 channels, giving a '4share'. Share in multichannel homes is now taken as the key measure of success, as those homes are assumed to be indicative of the future, and C4's target audiences, 16-34 year olds and ABC1s, are early DTV adopters. Moreover C4's share in multichannel homes is relatively poor.[21] Changes in C4's share have huge repercussions: each percentage point represents £50m in advertising income. In multichannel homes E4 is expected eventually to add 2% to the main channel's 6-7% share.

For the BBC, while maintaining share asC psos s,lat(C)-16 o(C)-16 reaso(C)-16n(s)-424.d.

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asper1031(e(e)11.1(a)11.1(t)1.1(i)-10.2(n)10.1ge)-324(t)-10.1the or(e)-33512v(luh)11.1((s)-3353((m) ‘let the viewers decide’. They are often cited by those engaged in the new ventures, although their relation to C4’s practice remains to be interrogated. The concept of diversity – also mentioned, and originally a key term in C4’s remit – was not listed at this time, but was subsumed within ‘freedom’ in a limited way: ‘Channel 4 believes in individual freedom and seeks to promote diversity of opinion and freedom of expression’. It is notable that this use of ‘diversity’ is narrower than the common usage of the term in discussions of public service broadcasting.

people are beginning to expect to pay for services, if we don’t acknowledge that reality we are in danger of finding ourselves in a fast-moving market [with] advertising revenues collapsing [and]

By contrast BBC new media executives see the BBC's role not only as responding to but as helping to drive technological and platform development. The BBC's current economic strength means it can carry risks that commerce (and C4) might reluctantly carry. In terms of platforms, in 2001 it was developing a set-top box or card to allow free-to-air digital terrestrial access. In addition the corporation is obliged to develop services for each viable new platform, a costly investment given the rapid speed of change. The BBC supports some software development inhouse, and in iTV it has competed successfully against Sky to develop new applications and standards. However, some new media executives did not seem to discriminate between more spoke of the importance of the BBC taking a long-term view of building its audience. Just as BBC radio had the role of finding talent for television, so BBC3 and BBC4 are seen as spaces for risk and talent development for the wider BBC – given the BBC's chronic talent drain, an urgent cause.[25]

**9) The portfolio approach**

Both PSBs have adopted a 'portfolio approach' in conceiving of their expanding services. But this appears both more developed and more flexible on the part of the BBC, perhaps naturally given its far greater scale. Apart from exploiting brand strengths, C4's plans do not evidence a high-level concern with the complementarity of channels. Just one executive pointed to the genre specialisation implicit in the new portfolio: FilmFour for film and drama, E4 for entertainment, the main channel increasingly for factual. He reflected that this may have been Jackson's intention: to prepare niche channels suited to the multichannel future, but without announcing it as such.

The BBC's portfolio thinking is more flexible than C4's in relation to changing consumer mores, linked to its greater commitment to universality. The contrast is shown in the different projections made by C4 and the BBC of future consumer behaviour, projections that are far from reflections of existing reality but which, by becoming the basis for strategy, have the power to influence future realities. The BBC is *not* assuming a universal shift from viewing mixed to generic channels. Nor, in contrast to C4, is it assuming that pay services will become near-universally acceptable. Unlike C4, the BBC has no investment in its audience shifting to pay formats. BBC an older demographic, while BBC3 and BBC4 would also be mixed genre. In the transition period the aim is that BBC1 and BBC3 will be closely related entertainment channels differentiated by tone and age, with BBC3 linked also to Radio 1. BBC1 will be the unifying channel aimed at ‘everyone’, and it will continue with children’s programming despite the new children’s channels. BBC2 and BBC4 will also be related and are aimed at over-35s, with BBC4

Changes in the organisational culture of C4 are evident in a growing sense of division articulated by staff on the main channel between themselves and those running the new commercial services.

Organisational schizophrenia was further evident in the differing commitments of senior executives to the very idea of PSB. Jackson's speech on quitting C4 proposed that PSB is a redundant concept (Jackson 2001), while executives for the new services articulated a minimal

The puzzle is whether C4 can straddle television's increasingly distinct two cultures: commercial populism, and public service commitment to range and distinctive, high quality output. Much turns on the new CEO, who in December 2001 was announced as Mark Thompson, formerly BBC Director of Television and the man responsible for the BBC's DTV strategies.

**The BBC: Analysis and evaluation of the BBC's approach**

This study is clearly limited by the fact that it addresses and evaluates only the strategic planning of the new DTV services. It is their actual execution that will, for both C4 and the BBC, validate or invalidate the strategic thinking. Yet given this limit, in several ways the BBC's strategies seem more astute than C4's. BBC thinking on the new digital channels shows a more subtle and strategically flexible conception of the audience and of changing consumer habits than C4's. The new BBC channels are seen as responding to viewing habits as they evolve; executives speak of the need to encourage digital take-up through quality offerings, but not to assume too much and get ahead of current realities.[34] The BBC says it is committed to three core elements of public ‘assuming multiculturalism’. But he admits that the tone of BBC3 will be in tension with the BBC’s dominant middle class values, and he wondered openly whether BBC3 can achieve this tone within the BBC, seeing it as a test of the BBC’s ability to update and diversify its own culture. The risk is insufficient commitment to reinventing the BBC’s values for contemporary conditions: perhaps the critical challenge facing the BBC. A telling dimension concerns the multiculturalism stressed by executives as central to the remit of both BBC3 and BBC4. When pressed, there is little answer on how this change in the BBC’s culture will be delivered. While greater representation of minorities in staffing the new channels and its suppliers must be a key factor in achieving greater diversity on screen, executives are inarticulate about how it can be achieved given the BBC’s poor record on the issue.[38]

The BBC is currently buoyant: in late 2001 BBC1's audience share overtook ITV1's for the first time since competition began in 1955, and BBC1 and BBC2 remain strong.[40] Criticisms of the quality of BBC1, and of the legitimacy of the BBC's digital expansions on competition grounds, continue to be voiced. They will only lessen if and when the quality and distinctiveness of BBC1, the digital channels and the portfolio as a whole are proven in practice.[41]

## Conclusions

### Policy Implications

### *Overall*

C4 and the BBC share many strategic concerns: enhanced branding, developing new talent, connecting with youth, the challenge of the EPG and new forms of viewing, cross-platform developments and complementarity of services. Nevertheless, the central finding of the study is how *different* the responses of the BBC and C4 have been to the digital challenge. The BBC's public funding and current financial stability have been central to its capacity to offer strong free-to-air PSB proposals, while C4's thinking is driven mainly by the need to find new revenue streams. Whereas the BBC seeks to raise standards and, by extending its markets, to maintain and deepen its universality, C4 seeks to boost its earnings and its choice demographics. Given the plateau in digital take-up, and consumer resistance to the pay element of DTV,[42] for public policy objectives to be attained the need to draw consumers by offering attractive free-to-air services is great. The BBC has taken the lead, and thus far C4 is playing no part in this process.[43]

Government has set the PSBs contradictory challenges: a) to *complement* the market by offering PSB added-value to existing platforms, a role in which they are cautioned not to take excessive risks; but also b) to *innovate* and drive take-up by risking *more* than commerce will, such as in iTV, where the BBC has borne costly research and development due the instability of middleware.[44]

#### *Economic issues*

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[40] In late 2001 BBC1 had an audience share of 26.8% against ITV's 26.7%. This caused commentators to worry whether Dyke's BBC1 might be *too* popular, and by implication moving downmarket and reneging on its 'higher' public service obligations (eg Brown 2001b; Doward 2002).
[41] On the foundations for an assessment of quality in programmes, channels and portfolio, see Born and Prosser 2001.
[42] A central finding of the Consumers' Association survey (Consumers' Association 2001a).
[43]

Mid-budget programming has been the mainstay of British terrestrial television; it is where most risk-taking and innovation has occured. But with increasing numbers of channels, routine risk-taking tends to decline as mid-budget programming is squeezed out and output polarises between the mass of low-budget digital output and occasional high-budget ‘events’ on the main

Relatedly, this study critically highlights the laissez-faire relationship between C4 and its erstwhile regulator, the ITC. If C4 is founded primarily as a public corporation to deliver a variant of PSB, and if its increasingly commercial orientation has effects on the whole organisation, then it seems highly questionable for this development not to be subject to appropriate regulatory scrutiny. The problematic assumption seems to be that C4's commercial activities can have no detrimental effect on its PSB commitments. But even in purely economic terms this assumption cannot be sustained. The implications are that the ITC's, and in future Ofcom's, regulatory oversight of C4 should be reinvigorated, and should examine these issues and C4's commercial scope; and that C4's main public service channel might productively be ring-fenced from the predations of its commercial enterprises.[49]

In comparison, the BBC's search for free-to-air PSB solutions to enrich its offering and draw consumers to DTV, its technological efforts to develop a set-top box or card for free-to-air digital access, and its piloting of ambitious broadband schemes: these have been achieved under the BBC's current form of self-regulation and on the basis of public funding. This suggests the superiority of these foundations at present for the delivery of public policy objectives.[50]

In the debate about future regulation and the scope and nature of Ofcom, this in turn weighs against the suggestion of bringing the BBC under the remit of Ofcom. Ironically it is the BBC, whose regulation is often considered problematic, and whose DTV strategies have as a result develop more ambitious pilots, such as the joint venture BBC Hull Interactive, suggests that the BBC's concept and practice of interactivity is more socially and culturally enhancing than C4's.

On the eve of the founding of Ofcom, intended to embody the principle of 'light touch' regulation, it is ironic that, according to the findings of this study, the BBC's plans must be judged superior in public service and policy terms, and in terms of strategic conception; while C4's digital extensions, developed under just such a 'light touch' regime, have an air of fevered pragmatism and risk. The regulatory regime that has held sway since the 1990 Act therefore seems insufficient to its stated policy tasks. Moreover, government has had an ambiguous role in the DTV developments. Its policies strongly encouraged the BBC's wholesale entry into the new markets, which has drawn aggressive responses from commercial players crying unfair competition, which in turn has drawn direct intervention by government towards the BBC. This circuit of effects shows the incoherence of policies that depend substantially on publicly-funded market interventions, which then lead government, under pressure of powerful commercial interests, to exert dangerously direct micro-managerial controls over the BBC. Government would do well to appraise disinterestedly the important lessons of this situation in a dynamic new economic sector.

A recent policy article in a leading newspaper, claiming to represent current opinion on the BBC's future role, concluded: 'Public broadcasters are no longer simply broadcasting. With new services, such as online and new digital channels, consumer control and choice render the traditional justifications for public provision still more problematic'.[51]

consumer resistance to DTV continues to be substantial. During 2002, according to an ITC/BSC consumer survey, take-up of multichannel television slowed significantly, with 40% of households receiving DTV, about the same as in mid 2001. Pay-per-view film viewing on DTV was up, while use of interactive services was slightly down. Of those without multichannel television, 72% were not interested in aquiring it (Towler 2003).

In March 2002 ITV's DTT platform, ITV Digital, went into receivership as a result of chronic financial difficulties. This left government with a difficult situation, since DTT had been envisaged as the platform most suited to eventual universality and as a necessary competitor to BSkyB's DSat service. Following a competitive tender, the licence to relaunch DTT was awarded in July 2002 to Freeview, a partnership between the BBC, Crown Castle UK and BSkyB devoted to offering a free-to-air package of channels on the basis of an affordable one-off investment in a digital adapter. The BBC thereby extended its activities into platform provision, enhancing further its contribution to the delivery of public policy objectives through its free-to-air DTV package. It is a matter of concern that it has had to do so in partnership with Sky, already an overwhelmingly dominant presence. Yet the BBC's independence from Sky, and its principled commitment to and the ITC, which it succeeds. But during the passage of the new Communications Bill, in response to public concerns over the proposed liberalization of cross- and foreign-ownership rules, government and the Ofcom chairman have increasingly emphasised the need for Ofcom to exercise strenuous content controls; it will have a separate content board to focus attention on content issues, and the Bill includes a specification of public service requirements largely derived from the BBC Agreement. However, there is to be use of co-regulation between regulator and the broadcasters themselves in assessing the extent to which the PSB remit has been met, and it appears likely that extensive liberalisation of ownership will remain in the Bill as enacted. As yet the means of strenuous content regulation have not been spelled out in sufficient detail, and the incoming regulatory regime therefore appears contradictory and unresolved.

**Implications for Economic Sociology**

This study has several lessons for economic sociology. First, it has implications for understanding the conditions of technological and cultural innovation. Analysis of the socio-economics of technical innovation highlights the tendency of private capital, particularly in conditions of risk and uncertainty such as those that characterise the contemporary media economy, to underinvest in innovative research (Stoneman 1987). Such analysis lends support to the view, which I have developed elsewhere, that public institutions can play a key role in developing innovative forms of cultural production (Born 1993), and this study points to the BBC's critical role in current innovations in DTV. Executives from both C4 and BBCi ndet the struggle for discursive primacy and the place of discourse coalitions in responding to conditions of chronic uncertainty and risk (Beck 1992, 1999; Beck, Giddens and Lash 1994). On the other hand, recent theoretical work in sociology (Callon 1998a, Barry and Slater 2002) and social and cultural changes, including the conviction that the concept of minorities is no longer socially meaningful, and that the values of PSB have declining salience for British society (Jackson 2000, 2001). And finally the projection that commercialism and innovation in media services are, or can be, synonymous. Clearly, this constellation of projections is teleological, forecasting precisely the conditions which justify C4's desired strategic direction. The market projections are folded into institutional strategies; they become the basis for the PSBs' broadcasting and new media practices, and from this they emanate out to condition larger economic, social and cultural processes.

The study also highlights, through the case of digital television, the diverse rhetorical underpinnings of constructions of the economic future. Three modes of projection can be discerned in the broadcasters' strategic rationales: those that are primarily normative or principled in orientation, those that are primarily realist or pragmatic, and those that are primarily reactive or defensive. They may be combined, and switching can occur between them. C4's proposition for E4, for instance, combines normative, realist and defensive projections: that E4 augments the space for innovation; that it is a pragmatic response to the rise of pay-TV and the need to exploit pay-TV rights; and that it is a necessary defence against rivals' predatory moves into C4 branding oriented functions of such marketing techniques, evident in a relentless drive to differentiate and extend existing markets.

By becoming the basis for institutional strategies, the projections condition the markets in which the PSBs operate, altering the relative positioning of competitors, restructuring the broadcasting field, delimiting the alternatives available to media audiences, opening up some possibilities and closing down others. There is, of course, nothing inevitable about the dominance of pay TV anticipated by C4, apart from the interested discursive coalition – including neo-liberally-inclined governments and powerful media players wielding substantial political influence - intent on persuading the European public that it is inevitable. The more this discursive coalition proclaims and enacts that pay TV is the norm, the more likely this is to become the case. And through projections the strategies adopted are legitimised by a short cut that apparently forecloses the unpredictable full circuit of production and consumption.

The differences in market projections matter; they profoundly influence outcomes. C4's framing of the challenge of DTV is radically different from the BBC's. Where the BBC's DTV projections, supported by increased government funding, take in social and cultural utility, universality and particular minority needs, C4's frame has given priority to financial stability and commercial entrepreneurialism. Of the two, it is C4's discourse that forms part of the currently hegemonic discursive coalition in Britain, predicated on the view that there is now little need for anything 'outside' commercial broadcasting: an astonishingly bold attempt to reframe (Callon 1998b) the British - and, given Britain's symbolic importance, the European - broadcasting field. The analysis presented here indicates the influence of C4's commercial funding and weak regulation on the character of its projections, and how such projections have been paralleled by the mutation and fragmentation of C4's philosophy and organisation.

economic temporality (eg Brown et al 2000) and the systematic means by which industrial actors attempt to control the economic future. The motivated futurist projections of institutions like the BBC and C4 in leading economic sectors such as the convergent media and IT industries have significant power to influence future realities, as the results of past projections are cumulatively laid down and sedimented, becoming the basis for further projections. Binde (2000), analysing the role of forecasting, argues for an 'ethics of the future' based on an awareness of the way that discourses that emerge ascendant from the struggle for discursive primacy bear responsibility for delimiting the future. Less ethereally, it behoves the regulatory regime entrusted by government with the public interest to ensure that changing economic conditions and the short-term interests of vulnerable institutions do not have the effect of rewriting the founding principles of Britain's public media culture.

## Appendix: List of Interviews

| Tape | Transcript File | Interviewee | Job |
|---|---|---|---|
| 1AB2A | Dig1-2GO1.doc | Giles Oakley | Ex-BBC Head of Community Programme Unit |
| 3A | Dig3JS1.doc | Jane Scott | BBC, Head of TV Strategy |
| 3AB4A | Dig3-4RH1.doc | Richard Halton | BBC1 and BBC Choice/3, Strategy Manager |
| 4AB | Dig4MS1.doc | Michael Starks | BBC, Director Free-to-view Project |
| 5AB | Dig5AM1.doc | Adam Macdonald | BBC, Head of Scheduling, BBC1 and prev. BBC2 |
| 6AB | Dig6JN1.doc | John Newbigin | C4, Head of Corporate Relations |
| 7AB8A | Dig7-8JO1.doc | Jeremy Olivier | BBC, Head of Strategy, BBC New Media |
| 9AB | Dig9RD1.doc | Richard Deverell | BBC, Head of New Media, BBC News |
| 10AB | Dig10AP1.doc | Adam Pearce | Ex-BBC, Strategy Manager, New Channels |
| 11AB | Dig11JT1.doc | Jonathan Thompson (1) | C4, Deputy Head of Strategy |
| 12AB | Dig12AA1.doc | Azeem Azhar | Ex-BBC, Deputy Head of BBC Online |
| 13AB | Dig13SG1.doc | Scott Gronmark (1) | BBC, Head of Interactive TV, BBC New Media |
| 14AB | Dig14AA1.doc | Andy Anson | C4 Head of Strategy, Pay Channels & Interactive TV |
| 15AB | Dig15GB1.doc | Gerry Bastable | C4, Head of E4 and 11.4(t)-268.2(-290e001t/.7(D2MT1(-)-10 |

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|---|---|---|---|
| 30AB | Dig30AB1.doc | Alison Button | BBC Knowledge/4, Head of Audience Research |
| 31AB | Dig31AT1.doc | Andy Townend | BBC, Head of TV and Radio Distribution |

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