

# About 4 Andy Duncan Oxford Media Convention keynote

## 19th June 2006

Good morning everyone, and thank you for inviting me to open this year's Oxford Media Convention.

In the Media Guardian a few weeks ago, cheek-by-jowl with news of a possible Virgin/NTL mega-merger, there was a striking little story about newsgathering and distribution in Liberia. This consisted of one man chalking up in words and pictures what he considered to be the main stories of the day onto three blackboards outside his shack in the capital, Monrovia. In a barely literate, information-starved society riven by civil war and political corruption, this is news people can use, delivered on a 'platform' – literally in this case – absolutely in tune with their needs and way of life. From content creator direct to citizen-consumer via nothing more sophisticated than a stick of chalk. And interactive too, because in front of the blackboards he'd put a big white suggestion box.

The simplicity of this transaction seems so far removed from our First World abundance of communication technologies, it's almost obscene. Here we not only broadcast Channel 4 News - annual budget £22 million - to the nation nightly, you can also watch it on your laptop and get Jon Snow's specially tailored version on your phone via our mobile portal. And soon you'll be able to access even more through our new multi-million pound news and current affairs service online.

Though we might spend a lot more on content and technology, the man in Monrovia and most of us here today are engaged in exactly the same business. Whether we do it for love, money, some higher public purpose or – as in Channel 4's case - a mixture of all three, we're all in the business of expanding people's knowledge in forms, and by means, they can use.

Of course, my vision for Channel 4 doesn't actually extend to giant blackboards outside our Horseferry Road headquarters. Mobile TV? Yes. Broadband? Yes. Video-on-demand? Yes. But blackboards? Not unless the technology undergoes some serious digitisation.

It's my vision for Channel 4 – and our strategy for delivering it – that I want to spend the next half an hour or so outlining to you. I'll explain how we are extending the public service competition that the main Channel 4 service currently offers BBC television onto every meaningful media platform. I'll explain why our successful delivery of this vision is vital to the continued health and welfare of public service broadcasting in this country. And last, but not least, I aim to detail the help we believe is necessary from regulator and government as Channel 4 takes this next big, creative leap forward into an on-demand world. Because, while the BBC's finances and governance for the next decade have been heavily debated and are now all but confirmed, Channel 4 is the one piece of the public service puzzle whose future is not yet secure.

PAUSE

We all grew up in a world where television was central to people's lives and broadcasters were the gatekeepers who allowed us access to its treasure house, via the box in the corner. Now that world has gone and people's relationship with television is changing. For anyone under 25, it's no longer their primary focus for entertainment and information, but one of many forms of media available wherever and however they choose. And the relationship is no longer one-way but dynamic: now people can schedule, shape, interact with and invent that content for themselves.

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The far-reaching implications for broadcasters are obvious. We only have to look to the music industry to see what happens if you don't prepare for this kind of revolutionary change. Companies who thought they were in 'the record business' and failed to take account of how music downloads were transforming their industry, are now history or a shadow of their former selves. Television companies face a similar fate unless they can make the transition from being single-focus broadcast businesses to multi-dimensional media organisations.

This applies as much to Channel 4 as to any other broadcaster, but there's an additional imperative for us to make it happen – we were set up to fulfil a public purpose. If we don't understand and cater for how media content is being created and consumed now, Channel 4 – but more importantly its unique remit – will be consigned to history too.

I'm not going to let that happen. It's my job to lead Channel 4 successfully through this vital transition. Channel 4 was set up with an exciting and inspiring public purpose and, I believe, we're currently delivering against it fantastically well. I'm determined to see that we carry on doing so. It's not an easy task, but we have two big advantages that I think give us a head start.

First is the very strong relationship Channel 4 already has with the young audiences who are driving change. Our share amongst ABC1 16-34s last year was more than BBC2 and Five's combined. We're nudging ITV's and have occasionally overtaken it, and when asked which channel is the one 'for them' half as many again in this group say Channel 4 as say ITV. They rate us the best for mould breaking entertainment, US imports and programmes for young people, but they recognise our remit values too. According to our most recent tracking survey, the Channel 4 portfolio of channels is seen as more innovative, more thought provoking and more trouble making (in a good way!), than any other channel. Our scores are at their highest level since this research began in 2001. Even with The X Factor playing at the time the fieldwork was being done, 16 to 34-year-olds still put us ahead on 'most talked about programmes' by a wide margin.

So we're already engaging with the people who will help determine our success in future and we're working to keep that relationship close and strong.

The second advantage is Channel 4's unique status - our capacity to harness commercial means to a public purpose end.

One of the reasons for the extraordinary success of Freeview, when I was at the BBC, was the way we were able to harness commercial disciplines to deliver a public benefit – stimulating interest in new free-to-air digital channels and so paving the way for successful switchover. We had a great proposition, a carefully crafted brand, we'd taken pains to understand the audience and the market and we built productive relationships with other commercial stakeholders. These all came together to serve a public purpose. The parallels with Channel 4 - the paradigm of public-private partnership - are obvious. The Freeview experience was the perfect preparation for this job. It made me appreciate the need to become even more canny about exploiting commercial means to support public service ends in future. Because, in the final analysis, Channel 4 exists only to deliver its remit.

The late Philip Whitehead, a distinguished supplier of Channel 4 current affairs programmes, was among those who had a vision for a new kind of channel as the old BBC-ITV duopoly was at its height in the 1970s. Free of institutional influence, oppositional, a creative place for new voices who would push boundaries and extend ideas of what television could say and do. Nearly 25 years later, I'm proud to say Channel 4 is still all of those things and more. We're as passionate and provocative as ever. But to translate these values into the next 25 years, and to carry on doing the job Parliament asks of us, we have to work across much more than a single television channel. We have to be wherever people are and on the device on which they want to access what we have to offer.

We have to deliver all the qualities of 4ness we have grown to know and love, across a much broader canvas because that's where our public will be in future.

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Why is it so important for us to complete this transition successfully? Because the survival of public service content in future depends not just on a strong BBC, but also on a thriving, active Channel 4.

Some time ago, the BBC realised that to secure its own future, it had to reach audiences in new and unfamiliar ways. This meant unprecedented expansion onto new platforms and a hike in the licence fee. Nevertheless, successive governments have been convinced by the argument. The alternative spelt a slow and dismal death for public service broadcasting.

Now the Corporation is asking for another inflation-busting settlement to enable it to complete its digital vision. Channel 4 isn't in the same income league, we don't have the benefit of the Licence Fee, and our ambitions are different, but the analysis and the solutions are exactly the same. For PSB to have a voice in a noisy media market, broadcasters need strength and scale. The BBC has both.

But, as Ofcom recognises, as Lord Birt suggested at Edinburgh last year, and as the whole Charter debate thus far has revealed, the BBC's survival as a public service broadcaster is necessary but not sufficient to the survival of PSB itself. Plurality and competition are even more critical in future, as the number of outlets expands but fewer of them produce public service content in any meaningful form. The PSB landscape has shifted even in the last few weeks. The closure of its news channel, for example, is a telling indicator of where ITV sees its future.

This isn't a criticism. It's inevitable that ITV and Five's PSB presence will pale the closer to switchover we get. The decline of public service output on the shareholder-owned channels is understandable and unstoppable. The question is not whether the BBC should have public service competition, but who will provide it.

It seems very clear to me that Channel 4 is not just the obvious choice, but the only one. I'll admit this was less clear a couple of years ago, when my predecessors seemed more focused on shoring up the channel's economic model through a proposed merger with Five than

forging a new public service future. I think it's true to say that the prospect of a Public Service Publisher helped sharpen thinking, words and deeds. Now I hope there's no lingering doubt that Channel 4 has both the ambition and the potential to be the alternative, alter ego and public service pacemaker to the BBC in the digital world.

That world is here. Already viewing outside the home is starting to take off. Half of all 13 and 14 year-olds would rather throw out their TV than give up the Internet, and 10 million TV files are shared every week, the majority of them illegally. And nearly a third of 14 to 21-year-olds have their own blog or website. Knowledge now comes from all sorts of places and to reach people we have to be in all those places. That's why my vision for Channel 4 is to make it bigger, bolder and broader so that it can provide public service plurality on every platform.

So this is how we're setting about doing just that:

1. We're safeguarding the core channel as the centrepiece of our endeavour with increased investment, so that it continues to be the natural home of creativity, innovation and thought-provoking ideas.
2. We're expanding our multi-channel portfolio to extend the Channel 4 proposition as audiences fragment and terrestrial share erodes, and to ensure that our digital TV channels make a public service contribution in their own right.
3. And we're exploiting new media to push our distinctive content in new forms and to create new revenue streams to support our public purpose as advertising revenue comes under pressure.

On the core channel we're spending more than half a billion pounds for the first time this year, and incremental investment since 2004 is paying off handsomely in creative achievement and remit impact. Jamie's School Dinners, Elizabeth I, The Government Inspector, the Beslan Dispatches, the Torture season and The Year London Blew Up are just some of the titles that made for an exceptional 2005. We're

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only three weeks into 2006 and we've already had shows as diverse but thought provoking as *Autopsy: Life or Death* and Richard Dawkins' anti-religion polemic, *Root of All Evil* and shows as talked-about as *Celebrity Big Brother*. We're getting more awards and more column inches than anyone else and we're the only terrestrial channel to hold our all-time audience share and actually increase our peaktime share in the last year – a gravity-defying result.

Most importantly, I think we're setting benchmarks in certain key public service genre that are encouraging other PSBs, notably the BBC, to raise their game. The success that Channel 4 has enjoyed recently with topical single dramas such as *The Deal*, *Hamburg Cell*, *The Government Inspector*, *A Very Social Secretary* and *The Queen's Sister* has contributed to persuading BBC2 to reassess its own strategy for drama.

I'm proud to say the core channel is in excellent shape.

Our multi-channel strategy is now developing fast after some years of marking time. Last year we moved E4 onto Freeview and successfully launched More4. E4 has almost doubled its audience as a result and More4 has allowed us to boost our output of peaktime weekday news and factual, and extend our reach to younger audiences. E4 is bigger than BBC3 and already More4 is bigger than BBC4. We want to build on this success with more specially commissioned drama and comedy on E4 and more monthly 'events' of the scale and ambition of *A Very Social Secretary* on More4.

We're also doing something different in new media, rather than simply joining the 'me-too' scramble to plonk TV content on every platform in the hope it'll be a nice little earner. I'm determined that we stay ahead of the curve and stretch the creative potential of online and mobile platforms, because that's absolutely part of our remit.

Of course, we're in the business of distributing Channel 4 branded content – Channel 4 News webcasts, *Hollyoaks* 'mobisodes', *Big Brother* streamed through 3G mobiles. But we also want to develop new content, by supporting

the emerging new media supply sector with bespoke commissions. We have earmarked up to £12 million to invest in tailormade content. There is also one other area in which Channel 4 is really pioneering – by encouraging the development of user-generated content through our interactive sites, 4Docs, SlashMusic and, later this year, 4Laughs. More of which later.

Like everyone else, we're still learning about user tastes and behaviour and the revenue generating potential of untried platforms, but we must be doing something right as we came from nowhere to be nominated one of *New Media Age* magazine's New Media Companies of the Year in 2005

As we strengthen the core Channel 4 service and build out onto new channels and platforms, navigating our audiences to our programmes becomes more complex and more crucial than ever before. It is vital to keep our brand strong in a world of growing competition. That is why I've made marketing a major strategic priority since my arrival at Channel 4, almost doubling the network marketing budget to £50 million.

Expressed at its simplest, our digital strategy is about fulfilling the Channel 4 remit in as many ways as people now use television. This is easy to say, harder to do, but I'm confident it is possible, not least because Channel 4 is packed with talented and passionate people, at Board level and across every department in the Organisation. Indeed I believe we're already building bridges across different platforms and media with strong and distinctive content. Here, briefly, are some examples of what we're doing in three key public service content areas:

First, our most important public service genre, News and current affairs.

Channel 4 News is our most valued and respected brand and we're already making sure that it – and its offspring – are available wherever and whenever people want to use them. With the start of More4 News in October last year, we've already significantly increased our weekday peaktime news output. And, I can't resist saying, at a time when news has been pulled from BBC3, More4 News is attracting the young demographic BBC3 news was meant

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to deliver. And, as I mentioned at the start, specially tailored bulletins are now available via our mobile portal.

Current affairs is a traditional strength on the core channel and another example of our ability to connect with younger audiences. Sixteen of the top 30 current affairs programmes watched by 16-34 year olds in 2005 were on Channel 4. Dispatches is still growing, with 32 weekday peak editions this year, compared to just 12 in 2004, with a further increase planned for next year. Our well-regarded international strand Unreported World is also doubling its run and has moved to a new Friday peak slot throughout this year alongside an extended run for Thirty Minutes. More importantly, I also believe the quality of the programmes are better than ever. More4 has opened up more capacity for new kinds of current affairs and we're already using this to stunning effect with seasons like Iraq: The Bloody Circus, the like of which you won't see elsewhere.

We've always supported our news and current affairs output online, but we're making a major investment this year in much enhanced Channel 4 News and Dispatches sites. Together, these will offer a major free resource to help people understand the broader issues behind the news and give them information they can put to practical use.

We're also investing heavily in Documentaries, where the advent of More4 – with a budget of more than £20 million each year for original commissions – has made a new tranche of investment available for this 'cornerstone' genre. The Real Sex Traffic, Make Me Normal, and Cocaine represented some of the fine 'traditional' docs shown on the core channel last year, and there will be many more in 2006. But we achieve perhaps even greater reach and impact with formatted documentary series like Jamie's School Dinners and The Unteachables, which unpick difficult public policy issues and present possible solutions.

The UK has arguably the best documentary filmmakers in the world. We're conscious of our responsibility to keep that talent coming through and this is where our new media activity comes into its own. One of our

biggest online projects launched last year was FourDocs, available on the main Channel4.com site. It's a free resource for anyone who has ever wanted to make a fact-based film – including those already in the business. There are practical tips, inspirational clips from well-known documentarists and interactive games to hone directorial skills. You can also watch full-length documentaries on the site – both relatively recent examples from the Channel 4 archive and classics like John Grierson's The Drifters. And as part of our commitment to the democratisation of content, there's an opportunity to upload your own 4-minute masterpiece for critical scrutiny by Channel 4 commissioning editors.

In 2005 we funded the establishment of the Channel 4 British Documentary Film Foundation. This provides a mix of funding, training and mentoring for both aspiring and established filmmakers and helps them get their work to a wider audience. We also put half a million pounds a year into The Other Side, eight late night 'launch' slots a year for first-time directors.

I believe we're making a very significant investment in future documentary talent, on and off-screen, and across all platforms. Unlike the BBC, for whom training is a useful public service by-product of having a large in house production staff, I believe this democratisation of content and skills is a core part of Channel 4's remit.

The third area I want to mention is Comedy. Not a frontline PSB genre you might think. But it's both expensive and one of the most difficult areas to get right. Developing ideas and talent is a long and potentially wasteful process and not one that commercial broadcasters take on willingly, they'd much rather buy comedy off the peg. We do that too, of course, with the best of the US imports, but we also develop our own through established windows like Comedy Lab. There's great new home-grown comedy on the core channel this year. Starting next month we've got The IT Crowd from Father Ted writer Graham Linehan, the return of the wonderfully subversive Green Wing soon, and in development a new series from Comedy Lab graduate Peter Kay.

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And we're using the successful FourDocs template to create 4Laughs, a similar online resource for comedy writers and performers, whether they're just starting out or old hands. Like FourDocs, it will showcase a mix of known and new talent, with professionals giving the benefit of their experience and the opportunity to create and upload a short routine that could lead to bigger, and funnier, things.

For me, all these initiatives are about projecting the strength and special value of Channel 4 onto new platforms. They are all about creativity, innovation, encouraging new talent. They feed into and from our traditional programme strengths. And the remit is at the heart of them all.

### PAUSE

When I said our vision is to put public service plurality on every platform, I meant it. We see opportunities in many new sectors. Digital radio is such a key part of the new digital landscape, we need to be here too, not only for the scope it offers for new radio content and services, but for mobile TV and data services as well. The combination of the traditional role of radio in PSB, the natural complementary nature of radio and television and the importance of DAB to future media convergence and our audiences, create an opportunity to make a real impact.

Last year we put a toe in the water with a 51% stake in Oneworld, a talk station on the national multiplex, Digital One. Here, launching this week, Jon Snow is fronting a mini-series on some of the seminal issues affecting Britain today, including homelessness and drugs. This will also be available on our website as Channel 4's first-ever podcast. (Move over Ricky Gervais, a new pod-star is born...)

But this is just the beginning. We want to bring our creative, commercial and public strengths to the medium, just as we have in television. To achieve this we intend to:

- Put together a serious bid to apply for the second national DAB multiplex licence now on offer
- If successful, launch a portfolio of innovative 4-branded radio services delivered via DAB and

other platforms that will offer more choice for both BBC and commercial listeners

- And pioneer integrated audio, video and data services to mobiles.

Radio could make a perfect fit with our digital strategy. As well as offering a new outlet for original material, there'll be spin-off opportunities from our factual and entertainment output and we bring to the table a reputation for high programme standards and an unrivalled record of innovation. So we're talking to potential partners now about putting together a compelling bid for the new multiplex that will drive DAB into its next phase of growth and give Channel 4 access to important new platforms.

It seems to me – as I'm confident it will to the commercial radio companies – that with the BBC currently taking 56% of all radio listening, the commercial sector could do with a shot of new energy and the BBC could do with some public service competition. We're not in the business of replicating familiar commercial formats - though we will want some of our radio services to make money. Our aim is to contribute something new to the radio mix by offering a public service alternative to the BBC in news, current affairs, entertainment, lifestyle and comedy. I'm convinced that if we can put together a winning proposition, our potential investment in DAB will be a very positive development for the industry, for Channel 4, and for anyone who ever turned on a radio. Which is everyone.

### PAUSE

When I started this job in 2004, it seemed to me there were three strategic choices facing Channel 4:

- It could take the commercial route, and throw in the towel on the remit.
- It could continue to focus on the core channel, with multi-channel hovering on the periphery not contributing much either to the remit or to the bottom line, and stagger on until ad revenue finally collapses.
- Or it could raise its game, with a much wider ambition to put public service plurality on every platform, ensuring that Channel 4 and

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all it stands for will be there in many different forms for everyone in future.

It was obvious that only the third option would secure the future of Channel 4 in anything like its original conception. The others were about retrenchment, failure.

But we can't achieve the vision entirely by ourselves. As Ofcom's PSB Review suggested, we're working with others – including our stakeholders and potential commercial partners – to develop a business model that will underpin our public role in the future.

As for now, I'm extremely proud to say that Channel 4 is enjoying enviable commercial as well as creative success. The core channel is still, for the moment, firing on all cylinders and we've got money to invest in programmes and in our digital vision. But as those financial adverts warn, current success is no guarantee of future earnings. We know that PVRs, video-on-demand, and other non-linear viewing devices are beginning to eat away at the old advertising-based business model. And we also know that history is littered with the corpses of companies who didn't have the foresight to see what kind of business they were in. Just as Encyclopaedia Britannica failed because it thought it was in the books business when it should have been in the information business, and got decimated by the CD Rom, we mustn't fall into the trap of thinking we're only in the television business when really we're in a much bigger enterprise of which television is just a part, albeit the most important part for now.

I know there's scepticism in some quarters about my appeals to government and regulators to think about a future that might not be quite so flush with cash, but I'm entirely unapologetic about this. I would not be doing my job properly if I wasn't preparing the financial foundations for our transition to a multi-platform, multi-media future, as well as the creative ones. Just like the BBC, Channel 4 needs a degree of certainty and security over the next ten years if it is to become a strong multi-platform public service provider. I also think those that can see what the future holds in the medium term and beyond understand the issues we will face regardless of what is happening in the short term.

Clearly we are already doing everything we can to reinforce our financial model. We are a lean and mean organisation with less than a thousand employees, less than the old HR department at the BBC (before Mark got to work!), and we are working very hard to keep the cost base down despite all the new activities and growing complexities of our business. We're doing everything we can to develop a new business model that will grow revenues from new sources and support the ad revenue model that everyone expects will decline. And, as viewing moves from being a linear to an on-demand experience, we'll be proactive in developing closed and open VOD services with the key platform players, and we'll exploit the commercial opportunities of 4 branded services through mobile TV. Though our current expansion into new media is almost entirely remit-driven, we're gaining valuable insight into user behaviour and market partnerships that will translate into commercial propositions.

However, self help will not be enough. I believe we'll need a number of 'enablers' to help us realise our ambitious vision.

- First, the allocation of additional gifted DTT capacity would help us fulfil our multi-channel potential with more free-to-air services and more revenue-raising opportunities. Gifted capacity usually comes with public service strings, but this is one area where my digital ambitions and government's public policy objectives are in accord.
- Second, we need help with transitional distribution rollout and capital costs as we approach switchover

Our self-help measures and timely public policy interventions of this type – help in kind, if you like – should be enough to see us through to switchover. In essence we're asking for a digital version of the historical model of subsidising Channel 4 through free analogue spectrum. But we also think the Government's intention to keep open the option of some element of public funding for the future, is sensible. We understand how sensitive this is, especially when there's no apparent sign of penury at Horseferry Road.

We're not holding out the begging bowl and we're emphatically not demanding a public

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payout in exchange for our digital vision, but we must be confident of a lifeline if the business model proves insufficient to deliver public service plurality in a much tougher environment further down the track.

Ofcom has already recommended a significant policy and financial intervention on behalf of public service provision by proposing the PSP. Finding appropriate support for Channel 4 would be a far more effective and efficient route to guarantee long-term public service plurality. And there's a solid precedent: Channel 4 had a safety net from start-up until 1999. Times are far more uncertain now than they were then.

Ofcom and Government have listened sympathetically, but we really need some firm parameters for the next ten years now, so we can plan with confidence, just as the BBC is allowed to do. Leaving Channel 4 out of the equation when the Charter is being settled is like filling up the public service vehicle with petrol before a long journey, but forgetting to pump up the tyres.

Finally, achieving clarity and a fair settlement on new media rights is the last key to unlock our digital vision, because you can't have a multi-platform strategy without multi-platform content. If, as I believe, the Internet will be the next dominant medium and overtake 'traditional tv', then content rights will determine the scale and impact of our future presence there.

In the meantime, whilst Apple, Yahoo, Sky, Google and the phone companies are busy developing mobile and broadband TV services, broadcasters have Terms of Trade with producers that, like the 2003 Communications Act, don't yet fully recognise the opportunities and imperatives of the digital revolution. Channel 4 is doubly disadvantaged because it has no in-house production of its own to exploit. We're proud to be a publisher broadcaster but it has its drawbacks.

Ofcom's consultation document published last week, sensibly suggests that negotiation rather than prescription is the way forward, but reminds us that the result must maximise benefit to viewers as citizen-consumers and encourage the flow of creativity and diversity.

Amen to that. Redefining the primary rights window on a 'when, not where' basis is the only way to go, and recognises that much of the viewing on new platforms will be instead of, not in addition to, viewing on the core channel. We're not increasing total reach or revenue. We're trying to cater for our viewers as they choose other viewing, surfing and downloading options.

We look forward to having a constructive dialogue with PACT over the coming weeks. We're in this together. Channel 4 still fully funds most projects and takes all of the risk. Producers' creative work must be properly rewarded. But I also believe that, as a creative commissioner, proactive in bringing a range of brilliant content to public attention, and as a leading player in the UK independent market, we have rights and responsibilities too. We must protect our investment and therefore our future ability to deliver the remit.

To do this, we need a reasonable primary window and a decent 'hold-back' period across all necessary platforms, and a fair share in products and services based on the programmes we commission. Together we need to find ways to create new value, not argue over the potential split of revenue that does not even exist yet. I think there's broad agreement on the basic principles, but we must address that devil in the detail soon because Channel 4's future depends on a workable settlement.

### PAUSE

So we're well on our way on this exciting transitional journey and we've got a clear view of the destination. We want to be able to deliver our public remit not just across network TV, but across all new media platforms where our audiences will choose in future to access our content. With a little help along the way, I know that Channel 4 can fulfil its potential as a unique resource for knowledge, ideas and inspiration in the digital economy. I want Channel 4 to be the most accessible and the most valued communicator and still be the coolest media brand around.

PSB in general and Channel 4 in particular are a force for good in society. I've set my

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sights on a bigger, bolder 4 working across many dimensions to be the leading shaper of contemporary culture in Britain. Providing public service plurality on every platform. Delivering groundbreaking, inspiring and provocative programmes and services. Being true to our remit values of innovation, experimentation, creativity and diversity. And making an even greater impact on people's lives after switchover than today.

Thank you.

ENDS