

POLICY BRIEF

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Public Service Media & the Digital Challenge: PSM as Critical Media Infrastructure

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How do Public Service Media (PSM) organisations create value? At a pivotal moment for the UK in determining the future role of PSM and how it should be funded, this study examines the changing role of PSM in a rapidly evolving media ecology.

Our research draws on document analysis, quantitative modelling of funding options, audience focus groups and a comprehensive programme of interviews with practitioners and decision-makers across all UK PSM organisations and in Norway, Denmark and Germany and also with senior managers in alternative critical infrastructural sectors (rail, aviation and healthcare).

Findings highlight how emphasis on underpinning democracy, promoting social cohesion and supporting emergency preparedness - functions that are essential to the safe and proper functioning of everyday life - has increased. As a result, PSM should be recognised as **critical media infrastructure**.

Research Questions

- How does Public Service Media (PSM) deliver public value in the digital era?
- Does PSM have an infrastructural dimension?
What lessons can PSM learn from other critical infrastructure sectors?
- As the importance of PSM in preserving and protecting everyday life and national security grows, how does public policy need to change?
- What are the implications for how PSM should be funded?

Changing imperatives for PSM in the digital era

Information security and democracy

In the digital era, PSM perform an increasingly critical role in countering dis and misinformation through provision of trusted and accurate news. Verification and fact-checking services, combined with raising public awareness of misleading information are of central importance.

Connectedness, tolerance and cohesion

As global streaming services grow in popularity and economic heft, the supply of distinct locally-relevant PSM content is vital in combating polarisation and isolation and in sustaining societal connectedness and stability.

Emergency preparedness

Pandemics, extreme climate events, conflict and geopolitical uncertainty increasingly underline PSM's critical role in supporting national security during conflict, disaster etc.

Information security and democracy

BBC Exec, Interview March 2025

...[I]n the era of alternative facts and who can you trust and the internet going mad... it definitely should be of enormous concern to the government and regulators that trusted - call it "objective" but everyone would have an issue on that - news from essentially the BBC and us, is protected....

ITV Exec, Interview March 2025

Pursuit of truth without an agenda is our **first** priority and it's because in a world that ... is becoming more factionalised, the risk of disinformation, the threats of it mean we think this is something that ...should be cherished"



Connectedness, tolerance and cohesion



'The economics of this "transterritory filler work" mean that an SVoD like Netflix could stitch together one big audience from a set of separate, disassociated audiences in different markets. The global telly of the future will not be - and isn't being - designed to reflect Britain back to itself, to bring the nation together at particular moments, to inform and educate a particular society or to care about promoting any kind of social cohesion' (Alex Mahon, CEO Channel Four, Speech to RTS, Sept 2019)

BBC Exec, Interview March 2025

As we think about the fragility of society today, the pressures on communities, the polarisation of debate, the intergenerational challenges in society right now ... I would argue that PSBs have a particular function to create *common space* for people in a way that a lot of the new emergent technologies, in a sense, isolate people"

We target everything to make the viewer feel like we are not just talking about a subject, but we are relating that difficult subject to *them* and their lives, that they will get something from it by watching it.

Five Exec, Interview, Feb 2025

Emergency preparedness

BBC Exec, Interview March 2025

We take that role really seriously - we rehearse, we do business continuity exercises on our ability to tell important news and information to the nations of the UK in [emergency] scenarios

Good media is also good defence policy. Because it is about digital resilience etc which is becoming more and more important

NRK Norway, Interview June 2025

Reappraising how PSM delivers value

Today's world is characterised by complex challenges and escalating systemic risks fuelled by uncertainty, conflict and the transformative impact of global digital platforms.

These developments have altered the distinctive ways in which PSM delivers value to society, the economy and the polity. Functions that are more security-relevant, including providing trusted impartial news that counters misinformation, addressing crisis situations and story-telling that facilitates cohesion and stability, are increasingly to the forefront.

We argue that, as a corollary, PSM deserves recognition as a critical infrastructural asset. And traditional conceptions of how PSM deliver value need adjustment so that they extend beyond 'individual', 'societal' and 'industrial/economic' to include an infrastructural dimension.



Individual

- Personal value derived from consuming and engaging with PSM content



Societal

- 3rd-party benefits of meritorious PSM content
- Social inclusion and cohesiveness



Industrial/ economic

- Supporting creative economy
- Creative capacity-building
 - Regional development



Infrastructural

- Informational security
 - Societal connectedness, stability and security
 - Emergency preparedness

Lessons from other critical sectors

In what ways can the experience of organisations in alternative critical infrastructural sectors such as rail, aviation and healthcare offer insights of relevance for public service media?



Interdependencies

Critical entities, including in the communications sector, cannot and do not operate in isolation so must avoid siloed, asset-centric management and, instead, retain a sharp focus on interconnections and pathways to other infrastructural components that render them vulnerable to cascading failure.

Ownership Configuration

Ownership arrangements and industry structures often play a significant role in shaping the ethos, values, objectives and modus operandi of infrastructural organisations.

Monopoly, Competition and Universality

Where inequalities of wealth and geography would otherwise impede equality of provision, monopolies may in some cases be better placed than fragmented systems to deliver universal societal access to critical infrastructure.

Resilience

Critical infrastructure organisations embed resilience through robust systems for managing risk, continuous learning, and adaptability and agility, including in public messaging

Funding models for PSM

If PSM supports national security and is a component of critical infrastructure, it requires stable funding. Our analysis suggests that a TV licence fee predicated on usage of licensable content *cannot*, based on current trends, reasonably be expected to sustain UK PSM adequately into the future, because the number of people willing to pay it is in irreversible decline.

However, a universal household levy offers a viable alternative with many advantages to recommend it including sustainability, adequacy and potential progressivity.

Funding model	Transparency	Progressivity	Independence	Stability/ Adequacy
TV Licence Fee	✓		✓ ²	
Subscriptions	✓		✓	
Advertising			✓	
Taxation Funding	✓ ¹	✓	✓ ²	✓
Household Levy	✓	✓	✓ ²	✓

1. Contribution to cover PSM, based on income brackets, can be included on payslips

2. Measures needed to preserve independence e.g. oversight of annual adjustments by separate arm's length body; multiyear settlements

Implications of infrastructural role

FUNDING

The critical functions performed by PSM entail costs but sustainability is a must. A universal household levy is a more sustainable option for UK PSM than the current TV licence fee.

RESILIENCE

PSMs need more proactive, systematic and integrated approaches to resilience-building and management of potential threats.

POLICY AND REGULATION

UK policy should:

- encourage greater focus on resilience
- provide strengthened oversight and management of vertical interdependencies
- focus on ensuring a future-proofed industry structure

RELATIONSHIP WITH STATE

The security-relevant functions that PSM perform call for attention to:

- which government ministries should oversee and support PSM
- how to balance security with autonomy
- what measures can best protect independence from the State

About the Study

This three-year project funded by the UK Economic & Social Research Council (ESRC Ref ES/X005690/1) investigates the purpose, public value and funding of PSM. At a time when changes in distribution and in the economics of the media industry have fuelled consolidation and the rise of powerful global competitors, it examines the challenges faced by PSM in the UK and how they deliver public value.

New functions such as countering online misinformation and disinformation are not merely additions but rather they re-position PSM as elements of 'critical media infrastructure' which is a focus for this project. The project ran from 2023-26 and is led by Gillian Doyle (Principal Investigator), Professor of Media Economics, working with Co-Investigator Professor Raymond Boyle and Research Associate Dr Kenny Barr, all based at the Centre for Cultural Policy Research (CCPR), University of Glasgow.

