Television from Small Nations
building a network for cultural and commercial success

A report by the Centre for Media and Culture in Small Nations, University of South Wales

www.culture.research.southwales.ac.uk
Foreword

This multidisciplinary, international research network was established with a grant from the Arts and Humanities Research Council in order to address the specific challenges and opportunities facing television broadcasters and producers in small nations. For small nations the television industry performs a number of important cultural, political and economic functions: constructing cultural identities, contributing towards a democratic public sphere, and enabling minority-languages to thrive in the modern world. However, several structural challenges shape their TV industries including less access to talent, fewer capital resources, higher production costs, and a smaller market for advertising and licence fee revenue. The network directly addressed these imperatives by drawing together academic experts and key stakeholders in the television industry, and enabling them to identify the necessary conditions for sustained success in both cultural and commercial terms. A total of 63 participants came from 12 different countries across Europe. Their expertise spanned academia, policy, public sector broadcasting and independent television production.

Dr Ruth McElroy
Principal Investigator, Television from Small Nations
Director, Centre for Media and Culture in Small Nations

“Looking at television as a research topic from the point of view of the small nations has widened our perspective. This will also certainly bring benefits to the many public service media organizations in small nations that are among the EBU Members that we serve.”

Dr Roberto Suárez Candel,
Head of Media Intelligence Service,
European Broadcasting Union

“This network helps to target exchanges across national and disciplinary borders and to better understand how TV in small nations can build economic capacity whilst also maintaining its cultural and linguistic commitments to the core audience.”

Siwan Hywel,
Partnerships Officer, S4C

“I can still feel the high after all the wonderfully productive discussions.”

Mads Møller Andersen
PhD student at Aarhus University

Key findings

Creating a sense of ourselves

Television production can contribute to the formation of national identities and to both the cultural and economic wealth of a nation, through locally grown business, direct inward investment and through attracting international interest in an area encouraging tourism and other forms of economic regeneration. Public Service Broadcasting (PSB) remains uniquely important to how small nations represent themselves to their own citizens but also to the wider world.

The television landscape is changing as digital innovation potentially provides new spaces and forms for cultural representation and user generated content (UGC) enables viewers in small nations to have a role in representing themselves. Further, UGC enables speakers of minority-languages to communicate with each other in ways that make a holistic, minority-language life visible and audible online. There is considerable value in such visibility for speakers of languages that are all too often rendered invisible in dominant language environments.

Public Service Broadcasting (PSB) contributes not only to the television ecology, but also to the culture and economy of small nations

PSB can make substantial contributions to civil society, to the economy, to the development of minority languages and to culture more broadly. It serves as a reflection of our reality, supports regional programming especially drama, enables risk and innovation relating to both content and technology, and functions as a training ground for future talent. Public service broadcasters are crucial to the sustainability of television production. Compared to its larger neighbours, PSB in small nations is even more critical due to the size of the market and the ongoing competition from imported content. The sustained cuts and political attacks which public broadcasters have experienced over the last few decades are having a significant impact on both investment and market share of these institutions across Europe.

Learning from the diversity of television ecologies

The way television is made across small nations is diverse. Independent production companies are a major feature of the TV landscape in small nations such as Scotland and Wales but less so in other small nations such as Norway where there has been relatively less deregulation. Public funding is also a key difference; for instance, the Macedonian government has allowed payment of the licence fee to be optional and the resulting loss of funding has meant that output such as drama and children’s content has nearly disappeared and the majority of content produced is now studio-based. Elsewhere however, in Slovenia and Norway for example, public support for PSB has made substantial cuts politically difficult to enact, though freezing public funding has its own consequences in an increasingly competitive television landscape. While these differences are significant there is still much to be learnt from international collaboration and knowledge exchange.
Articulating the value of PSB for a digital world
Public service broadcasters need to articulate more expansive arguments for their cultural value and contribution to public life in small nations. The tendency to focus on instrumental value has been that a limited range of interventions in the broadcasting market are being considered. Both tax breaks and top-slicing of the licence are often limited in their impact and accessibility especially to local industry. One often overlooked area of value of PSB is that individuals, companies and public bodies are critical to significant talent emerging from small nations, and without this, there is no future for broadcasting.

Digital innovation demands critical thinking
Digital is now everyday and integral to all aspects of broadcasting; however, we are operating in an environment where politicians and broadcast remits reflect the assumptions of an analogue era. Digital innovations impact on programme making, scheduling and marketing as linear television now operates alongside other forms of broadcasting including Subscription Video on Demand (SVOD) and user generated content as well as provisions such as the public service broadcasters’ own on-demand services. Both the Welsh crime drama, Y Gywyl/Hinterland and the Norwegian dramedy Liftehammer testify to the importance of Netflix as a platform for internationalizing content and of distributors such as All3Media. In both cases, PSBs have had to expand their thinking and practices to make these collaborations work. For Danish drama Nørskov, achieving a record high for viewings on TV2’s online platform allowed the series to build its audience in what is always a crowded and competitive genre.

Big budget provides short-term economic gain but little cultural visibility or sustainability
The Missing (a British drama set in France but filmed in Belgium) and Game of Thrones (filmed in multiple international locations including Northern Ireland, Croatia and Iceland) demonstrate the unequal balancing of economic gain and cultural visibility within the race for big-budget foreign investment. Local and often small-scale productions are frequently overlooked to the detriment of creating a rounded production ecology. Further, project based work such as big budget one-off productions creates a precarious ecology. Further, project based work such as big budget one-off productions creates a precarious ecology. Further, project based work such as big budget one-off productions creates a precarious ecology. Further, project based work such as big budget one-off productions creates a precarious ecology. Further, project based work such as big budget one-off productions creates a precarious ecology. Further, project based work such as big budget one-off productions creates a precarious ecology. Further, project based work such as big budget one-off productions creates a precarious ecology.

Digital is emerging but not dominant
Whilst digital technologies have impacted significantly on the environment in which content is being produced, linear television remains overwhelmingly dominant. The European Broadcasting Union, for example, found that in 2014 more than 90% of the European audio-visual market was in linear TV. Digital has not killed television, it has enhanced it. Public service broadcasters’ concern with the changing media consumption patterns of under 25 year olds means that they may neglect the bulk of the adult audience and take their continued support for granted. Digital innovations that appeal to diverse adult audiences merit more attention, not least because an ageing population is a defining characteristic of many European nations both large and small.

Co-production presents both challenges and opportunities
Co-production and partnerships, including with SVOD services like Netflix and Amazon Prime, have become established models for developing and creating content within small nations especially drama projects of scale and with production values to match. However, questions of power remain, especially in terms of rights negotiations for both content and platform access. This has excluded smaller broadcasters from platforms as the high cost of development and content rights may prohibit their engagement in all of these spaces. Small nations have traditionally been home to an often fragile independent production sector and this offers a worrying scenario for how their power might be further circumscribed in the future.
Social media and online content requires new talents and new methods

The importance of social media marketing raises questions regarding the skills, resources, and access independent production companies have to developing content. Not all broadcasters appear equipped to share content or editing platforms with indies and this may reveal how editorial control and a sense of ownership belies the more collaborative ethos that characterises social media forms. In the digital landscape it isn’t necessarily the presence of content which is problematic but rather gaining access to it. Technological affordances such as catch-up services may exist but audiences will only find content and engage with it if it can be accessed easily on a range of devices including smartphones, tablets and Smart TVs. There is huge potential here for broadcasters and producers to reach new audiences, as well as to deepen the relationship with existing ones. The Irish broadcaster TG4 have used the development of digital and social media platforms to create far more opportunities to engage directly with the substantial Irish diaspora across the globe. However, smaller broadcasters are often not able to take full advantage of the opportunities presented by digital media. Collaboration may be one solution to the problem of findability as demonstrated by the partnership between S4C and BBC which means that since the end of 2014, S4C has had a distinct channel presence (both live and catch-up content) on the BBC’s iPlayer service.

Policy must support the changing television landscape

Manufacturers of Smart TVs are significant gatekeepers to public service content. Regulators have an important part to play in making a diversity of content readily available to audiences. Platforms are not neutral routes to content but are themselves businesses with their own distinct priorities and affordances. A striking difference emerged in discussion between the accessibility of these two minority-language broadcasters. Whilst TG4’s catch-up service is available through their Smart TV app, S4C’s is not currently available through Smart TVs. Regulation may be especially pressing in the case of minority-language communities where the market is not sufficient in size to sustain diverse commercial provision or to ensure leverage with large corporations such as Netflix or You Tube beyond the territory. The financial costs of accessing such platforms and services is a major challenge for publicly-funded smaller broadcasters. Policy-makers and regulators need to think creatively about how actively to support plurality online in this business environment where the dominance of a few global corporations could easily squeeze out smaller players and languages.

Talent is key

Within the economic and cultural ambitions of small nations talent is the most critical resource. Strategies for nurturing, developing and leveraging talent are an important part of the support infrastructure of many small nations. For small nations, the question of talent is even more pertinent as their own pool of talent may be limited and they often have to compete with the lure of bigger markets in other nations where opportunities seem more abundant and attractive. Talent can be divided into two distinct subsets - talent in terms of creativity, innovation and idea generation, and talent as a more instrumental set of skills around project management and artistic delivery. Building the capacity of the labour market within small nations needs to be an essential strategy that will work most effectively when collectively owned and implemented. Partnership across sectors and international borders is a key component in establishing a holistic approach to talent development.
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