

**B B C**



## **A BBC For All**

Our response to the government's Green Paper

**© BBC Copyright 2026**

The text of this document (this excludes, where present, the Royal Arms and all departmental or agency logos) may be reproduced free of charge in any format or medium provided that it is reproduced accurately and not in a misleading context. The material must be acknowledged as BBC copyright and the document title specified. Photographs are used ©BBC or used under the terms of the Pact agreement except where otherwise identified. Permission from copyright holders must be sought before any photographs are reproduced.

You can download this publication from [bbc.co.uk/aboutthebbc/documents/bbc-response-to-government-charter-review-green-paper](https://bbc.co.uk/aboutthebbc/documents/bbc-response-to-government-charter-review-green-paper)

Designed by Emperor emperor.works

---

|                   |  |           |
|-------------------|--|-----------|
| Executive summary | 2  |           |
| <b>1</b>          | <b>A trusted institution</b>                   | <b>7</b>  |
| <b>2</b>          | <b>Delivering services for the public good</b> | <b>25</b> |
| <b>3</b>          | <b>Driving growth across the UK</b>            | <b>52</b> |
| <b>4</b>          | <b>Sustainable and fair funding</b>            | <b>70</b> |
| Annex             | 98   |           |
| Endnotes          | 108  |           |

---

# Executive Summary

The BBC is a vital national asset. It is a shared investment in our culture, communities, and democracy. It supports our world-leading creative industries and drives economic growth at home, and it promotes the UK's interests and influence abroad. In a fast-changing and challenging world, the BBC is needed more than ever. But it is also at risk like never before.

This is the message at the heart of the government's Green Paper. The government believes that the new Charter is an opportunity to make sure the BBC's public service mission can continue to thrive for decades to come. But we have to be clear-eyed about the jeopardy we now face – both for the BBC and for the UK as a whole.

## **The stakes for the BBC and the future of public service broadcasting are clear.**

Huge changes in the media market, audience behaviours, and an outdated funding model mean that, without real reform in this Charter Review, the BBC will no longer be able to deliver its core mission with the services the public has relied on in the past, let alone do more in the future. The extraordinary pace of change means the problem is now increasingly pressing.

Last year the BBC's licence fee income was around a quarter less, or £1.2 billion lower in real terms, than it was at the start of this Charter period, forcing difficult trade-offs. The BBC continues to take its responsibility to deliver maximum value for public money very seriously. It has already made over £1.5 billion of savings during this Charter, and has around half a billion more to deliver. It has extremely tough choices to make in the next two years, even before the new Charter period.

## **But what is at stake for the UK is far more profound.**

In today's media landscape, disinformation is thriving and a crisis of trust has left many of us feeling increasingly isolated and divided. Social media echo chambers are driving us apart, and there are fewer and fewer opportunities to engage in open debate, share unifying experiences, and find common ground.

We face an all-out assault on truth and facts worldwide, with the ability to access reliable information now intertwined with our national security and stability. Countries with media vulnerable to polarisation and capture are also more vulnerable to democratic disruption. In this context, the BBC's value as a UK-owned platform able to compete globally is clear, as well as the growing importance of the BBC World Service as a critical piece of national security infrastructure.

Meanwhile, economic pressures and financial uncertainty make it vital that the UK backs sectors with the biggest potential for growth. With the BBC as its cornerstone, our creative industries sector continues to be one of this country's greatest success stories and the potential for future growth is clear.

However, disruption by global tech giants has transformed the way content is viewed and eroded the traditional economics of television. A handful of global streamers command vast commissioning power while their algorithms increasingly control what content we find. The UK's national and local stories hang in the balance. Make the wrong choices now, and there is a real risk that UK creativity and storytelling will be squeezed out, and our creative sector will fall into decline.

### **This is the moment to intervene.**

As a new wave of technological change rapidly reshapes the world around us, the UK has important choices to make as a society. A choice to make sure we can continue to be able to find news and information we can trust. A choice to make sure we all benefit from stories and journalism that reflect our lives, our views, and our culture; and that the UK itself can continue to make its democratic values and influence felt on the global stage.

A choice to make sure that UK talent and creativity can thrive in the future, creating jobs and economic growth in every part of the country and allowing us to punch well above our weight worldwide. A choice to make sure this digital, AI-driven age will work for the benefit of us all, with no one left behind.

### **The BBC has a fundamental part to play.**

It was conceived over 100 years ago as a very deliberate, universal intervention to benefit us all. It was born out of difficult and divided times, from the idea that the incredible power of broadcasting as a new technology should be harnessed in the public interest – through a mission to inform, educate and entertain everyone.

We have now arrived at a similar crossroads. The BBC has no innate right to exist; however, the government recognises its unique power and potential as a mainstream societal intervention at a critical time. As it says in its Green Paper, the BBC is more than just a broadcaster, it is:

**'A national institution that belongs to all of us...  
If it did not already exist, we would have to invent it.'**

Department for Culture, Media and Sport

Today the BBC remains a world-class success story. It is the UK's number one media brand, used by 94% of adults per month, and is the only UK media brand in the top five most used for young people. It is this country's most-used and most-trusted source of news, used by 74% of adults each week in 2024/25, and is the world's most trusted international news provider, with a weekly audience of 418 million. It sits at the heart of the UK's creative and cultural life, creating content that provides millions with inspiration, escapism and joy every single day.

### **The BBC is focused on three roles that are essential in today's world.**

To pursue truth with no agenda; to back homegrown storytelling and support UK talent and creativity worldwide; and to bring people together, creating connections not division.

In this response to the Green Paper, the BBC sets out its plans to offer outstanding value to all audiences in the years ahead while supporting the UK's democracy, creative economy and society. It responds to the challenge of the Green Paper with a range of proposals to build on what the BBC has done for audiences in the past and provide increased value in the future.

That means continuing to offer audiences an unrivalled range of content and services across TV, radio and online. It also means seizing new opportunities to deliver in the public interest.

### **The BBC has ambitious proposals to do more in key areas that are important priorities for UK audiences.**

These plans will reinvent public service media for the future. They will help tackle the risks of disinformation in our society, giving audiences the tools they need to critically assess what they see and supporting local news provision and grassroots democracy (see Chapter 2). They will increase the BBC's reach and impact in trusted news worldwide, as part of a new era for British security, trade and influence (Chapter 2).

The BBC's proposals will champion British talent and safeguard the authentic homegrown content that UK audiences love, supporting our cultural wealth as part of a unifying national story (Chapter 2). They will evolve BBC Bitesize to make personalised, interactive learning opportunities available to every child, regardless of background (Chapter 2). And they will make sure the BBC goes further in supporting the creative economy, unlocking growth in the nations and regions and enhancing the global competitiveness of the UK (Chapter 3).

[→ Read more in Chapter 2](#)


[→ Read more in Chapter 3](#)

## **But delivering on these plans requires radical reform – of the BBC and of the framework in which it operates.**

All these proposals, whether evolving the BBC's current offer or reaching into new areas, rely on a new Charter that makes the bold choices that are needed to secure the BBC as a universal public service for generations to come.


## **The BBC has long understood the need to reinvent itself for modern audiences.**

This response details the progress made in recent years in driving very significant change through the organisation. But it also recognises how much further there is to go. It sets out ambitious plans to keep transforming the BBC for future success by making the organisation more directly accountable to audiences, and by building on the decisive action it has already taken to maintain the public's trust and set the highest standards in workplace culture (Chapter 1).

 [Read more in Chapter 1](#)

These plans will accelerate the transformation of the BBC's content and services to meet changing audience habits. We will reach more audiences where they are, on third-party services such as YouTube. And we will open up BBC platforms like iPlayer and Sounds to other UK content providers, so the country can retain scaled PSB services capable of competing with global streamers (Chapter 2).

The plans will move more money and power across the UK to fuel economic growth, support jobs and skills and build on the BBC's existing duties to strengthen the creative economy in all four UK nations (Chapter 3). And they will make further efficiencies that generate maximum value for money for all audiences and continue to deliver more growth from commercial operations (Chapter 4).

 [Read more in Chapter 4](#)

## **But success now also requires the government to make bold choices.**

Charter Review is an opportunity to secure a universal public service that is fit for the future. The BBC is seeking a new Charter that will support its transformation, delivering an organisation that is more independent, more sustainable and more responsive.

The independence of the BBC – editorial, financial and operational – is core to public trust. Of the more than 872,000 responses that the BBC received to its recent *Our BBC, Our Future* questionnaire, 91% said that it is important for the BBC to be independent from the government of the day. This is not simply a matter of how independent the BBC truly is, but also how independent it is perceived to be in an increasingly partisan and contested media landscape.

The next Royal Charter needs to protect the BBC's independence as a national institution, while at the same time strengthening its accountability to the public and making sure audiences can help shape decision making. In its Green Paper, the government recognises the issues posed by the Charter having an explicit end date and the uncertainty that can create, as well as the potential for political interference. The new Charter should therefore remove that end date and bring the BBC into line with other chartered organisations. It should also include changes to how appointments to the BBC Board are made, as well as reform of how the BBC's funding is agreed (Chapter 1).

The BBC agrees with the government that a more sustainable funding model is needed. The current model cannot maintain the BBC's public service mission for the future. When 94% of people use the BBC each month yet fewer than 80% of households contribute, reform is needed to deliver sufficient funding in a way that is sustainable and fair for all.

It is right that the government is consulting widely on options, recognising the pressures on both the BBC and household budgets. But the Charter must present a solution. The BBC does not have a fixed view on the model, but it does on the principle. As a public good that belongs to us all, the BBC believes that the best and only safeguard for its public mission is a funding model that is universal – delivering a BBC funded by everyone, for everyone – as a shared investment in the UK (Chapter 4).

Finally, a successful BBC must be enabled to be responsive to the changing needs of today's audiences. It should be allowed the strategic agility to choose how and where it offers content in the best interests of its audiences; how it can maximise its public service impact by opening up its platforms to other UK content providers; and to explore new strategic partnerships.

To support this, the new Charter should deliver a lighter, more growth-focused regulatory framework. It must continue to place appropriate checks and balances on the BBC's performance and market impact, but it should also be proportionate and reflect the reality of a market characterised by global competition and rapid technological innovation (Chapter 3).

### **This Charter Review is an urgent opportunity for the UK to secure the world's leading public service media organisation in the platform age.**

The situation could not be clearer: a Charter Review that simply maintains the status quo will not be enough to deliver any recognisable version of the BBC in the years ahead. It would abandon the BBC to managed decline and deny UK audiences the benefits of public service media at scale.

Instead, the government's Charter Review must make the hard choices that are now necessary to achieve a shared ambition: a universal and sustainable public service media organisation, helping to support a healthy democracy, a growing creative economy and a strong society for the future.

Chapter 1

# A trusted institution



# Overall position on trust, accountability and independence



**At a time when trust in institutions is falling and misinformation is rising, the UK needs strong, independent public service media more – not less.**

For more than a century, the BBC has been a unique national institution for the UK – a universal service and a unifying force that strengthens our democracy, our culture and our public life.

Despite long-term pressures impacting the media market, audiences continue to value and support the BBC’s mission,<sup>1</sup> and trust in BBC News increased from 2023/24 to 2024/25.<sup>2</sup>

Our duty to inform, educate and entertain has endured from the early days of radio, through podcasting and streaming, to the next wave of AI enabled technological change. The BBC has not just adapted to change but helped shape the future as a world leading public service media organisation. This creates value for UK audiences, as well as for the UK internationally. The BBC is consistently ranked the most trusted international news provider and is the most recognised British cultural export globally.<sup>3</sup>

However, seismic changes in global security, economics, technology and the media have increased polarisation and threatened our trust as a society, in the information we receive, and in the organisations that provide it. Recent Edelman Trust Barometer reports have highlighted a relationship between lack of trust and a sense of grievance, and active distrust. This creates a re-enforcing negative spiral that erodes social capital, risking disengagement from communal debate.

At a time when trust in institutions is falling and misinformation is rising, the UK needs strong, independent public service media more – not less. The BBC needs to remain a *‘light on the hill’* for audiences, as well as for the UK’s creative industries competing on a global stage.

We do not take the trust that the public has in us for granted. In this chapter, we focus on how we can continue to earn the public’s trust in how we operate. Independence – editorially, creatively and operationally – is fundamental for the BBC. Audiences recognise this too. Our biggest-ever engagement exercise *‘Our BBC, Our Future’* – answered by 872,701 respondents – showed clearly that independence is non-negotiable to audiences who want to be more strongly reassured of our independence from the government of the day.<sup>4</sup> When it comes to independence, perceptions matter as much as reality.

We know that recent issues have impacted public trust in the BBC as an organisation. Attitudes about the quality and impartiality of our news, current affairs and wider content offer are a key driver of public trust, and we address this in Chapter 2. In this chapter, we focus on how we could safeguard the BBC's institutional independence and refresh our contract with the public through strengthened accountability. We want to harness new technology and approaches to public participation to bring people closer to the BBC's decision making.

We also share the ambition in the Green Paper that the BBC sets the standard for workplace culture and environment. Our conduct and reputation as an employer has wide ranging impacts on our staff, partners across the industry and the public's trust in us as an institution. We have taken decisive action in response to our Culture Review, published in April last year, but we also know we must sustain this momentum. The BBC will continue to act to ensure it is a leader in the creative sector, holding itself to the highest standards and setting an example more widely.

A new Charter that strengthens the BBC's independence and public accountability is a Charter that will strengthen the fabric of the UK – building trust, supporting democratic life and refreshing a mission that can endure for generations to come.

➔ [Read more in Chapter 2](#)



The making of 'Asia'

*Credit: BBC/BBC Studios/Varun Bodh*

“

**A new Charter that strengthens the BBC's independence and public accountability is a Charter that will strengthen the fabric of the UK.**

“

The BBC is a unique institution, designed to be universally available and belonging to us all. On that basis, we must be held properly and publicly accountable for what we deliver and our decisions.

# Accountability and transparency

The BBC is publicly accountable in several ways, including reporting and transparency requirements, a complaints framework, independent external regulation and parliamentary scrutiny. This Charter is an opportunity to look at what works well, what could be refreshed or renewed and what could be streamlined or removed.

The media landscape has changed substantially over the last decade. The scale and nature of new technologies' impact on the sector (for example AI), means that media organisations have had to rapidly adapt. The next Charter should ensure the BBC is properly and transparently accountable for how it operates but also has the flexibility to continue to adapt and evolve effectively in response to fast-changing audience needs.



'Here We Go'  
Credit: BBC/Gary Moyes

## Holding the BBC to account

The BBC is a unique institution, designed to be universally available and belonging to us all. On that basis, we must be held properly and publicly accountable for what we deliver and our decisions. Independent regulators and parliamentarians assess and scrutinise the BBC, on behalf of the public, in addition to the internal governance and accountability measures the BBC has in place.

The last Charter Review introduced significant governance and regulatory reforms. Since 2017, the BBC has been regulated by Ofcom.<sup>5</sup> Ofcom is the independent, statutory regulator for the UK communications industries. It has regulatory oversight of the BBC's performance,<sup>6</sup> which includes setting the BBC's Operating Licence,<sup>7</sup> which contains various quotas but also transparency conditions that require us to describe how we will meet and report on how we have met our mission and public purposes. Ofcom continually assesses and reports each year on the BBC's performance against the Operating Licence as well as conducting periodic thematic reviews and considering outcomes for audiences with viewing data and surveys.<sup>8</sup>

Ofcom also monitors the BBC's impact on competition to help ensure the UK maintains a vibrant and thriving creative economy. Using its powers to investigate and, if necessary, impose remedies on the BBC, Ofcom aims to ensure that where the BBC improves or extends its services, this does not unduly impact fair and effective competition. Ofcom also regulates the relationship between the BBC's public services and commercial activities.

The BBC is also subject to audit and value for money scrutiny from the National Audit Office (NAO).<sup>9</sup> In the last Charter Review, the NAO was appointed as the financial auditor for the BBC Group, including its commercial activities. This was in addition to its pre-existing role conducting value-for-money reviews on the public services.<sup>10</sup> The NAO has undertaken 12 value-for-money studies since the start of this Charter. The reviews hold the BBC to account publicly and they often lead to parliamentary scrutiny of senior BBC executives by the Public Accounts Committee. We respond publicly to their findings, using them to strengthen our governance and improve how we deliver for audiences.

Under the current Charter, the BBC is also more broadly accountable to the UK Parliament and the legislatures in Wales, Scotland and Northern Ireland. BBC Executives and Board members regularly appear before, and report to, committees of the UK Parliament. We similarly give evidence to and are scrutinised by committees of the Scottish Parliament and the Senedd and have a Memorandum of Understanding (MOU) in place to do so at the Northern Ireland Assembly.



**Since 2017, the BBC's UK public services have been regulated by Ofcom.**



**As a universal public service broadcaster, the BBC has a responsibility to listen to, understand and respond to the public we serve.**



**872,701**

**people told us what they want and need from the BBC, our biggest ever audience engagement programme.**

## **Accountability to the public**

As a universal public service broadcaster, the BBC has a responsibility to listen to, understand and respond to the public we serve. A new Charter and Agreement should not be overly prescriptive on the means of achieving greater accountability but instead focus on the very necessary outcomes. We must ensure that everyone, regardless of their background or where they live, feels they get value from our content and services.

What the public thinks about the BBC and the choices audiences make about how they use our content and services is fundamental in shaping what we do and how we do it. The Green Paper recognises, ‘the BBC already does a lot to understand and engage the public in order to inform its decision-making.’ We use extensive audience research, feedback and data to guide strategic and tactical decisions across the organisation, and to ensure we deliver against our mission and public purposes.

We draw on continuous audience measurement, surveys and qualitative research across the UK to understand how the public use and perceive our content and services; to gather perspectives on the issues that matter to them (such as impartiality); and to inform BBC decisions.<sup>11</sup>

We also undertake targeted in-depth engagement with particular groups and communities, including direct engagement by Executives and Non-Executive Directors across the UK. This includes initiatives focussed on specific groups, such as UNBOXD<sup>12</sup>, a suite of research which engaged with over 5,500 16 to 24 year olds; and our Virtual in Person programme, weekly online sessions where BBC staff can listen to audiences share their perspectives on BBC content and operations.

We welcome the challenge in the Green Paper to think creatively about how we could enhance and deepen public participation to support BBC decision making and deliver more direct public accountability. We want to build on our experience of running large-scale engagement exercises such as ‘*Our BBC, Our Future*’. It was our biggest ever audience engagement programme where over 872,000 people told us what they want and need from the BBC.<sup>13</sup> It gave us some clear messages about what we’re doing well, and where we need to do better. We are exploring findings that emerged further through qualitative research, as well as nationally representative quantitative surveys.

We are looking at what other organisations do in terms of direct public accountability, ensuring that the public can effectively and transparently engage in institutional decisions. New models of public engagement and accountability could help ensure that the BBC continues to be shaped by the people it serves – strengthening trust, legitimacy and accountability, while preserving the independence that is fundamental to our role. Technology has an important role to play in unlocking new, effective and accessible means for the BBC to engage with our audiences and the public.

An example of such a model would be deliberative audience forums, such as citizen assemblies. These forums involve a cross-section of the UK public, reflective of the population overall, and could hear evidence, listen to the perspectives of others and deliberate on complex and difficult issues, driving more participatory decision making. We want to pilot these kinds of forums

to gain insight into how we might best deploy these techniques, on what decisions or issues they may most effectively be used and how we might best harness new technology to deliver them effectively.

The Board could also have a bigger role in commissioning or providing oversight to this work, ensuring that we are open about our decision making and how we have taken on board audience feedback. This would build on existing responsibilities of all Board members to act in the public interest and exercise independent judgement in overseeing the work of the Executive.

Our content and services remain one of the most powerful ways that we engage with and are accountable to our audiences. For example, we have used behind-the-scenes footage in a number of our Natural History programmes to explain how programme-making works in challenging environments; audiences can share their perspectives on our programmes via Feedback, Points of View and Newswatch; and our news teams offer insights into how our news stories are produced with Any Answers and Jeremy Vine offering active engagement with news stories. We want to explore content-based approaches to public transparency further, to see where they might add value for audiences and open up how editorial decisions are made and how content is produced.

We want to trial different approaches, adopt new technologies and methodologies, and ensure approaches work for audiences and the wider public. As the Green Paper sets out, it is important that the BBC can act with agility and maintain our operational independence, *“While it must put the public at the heart of what it does, we are clear that the BBC must ultimately still remain in charge of its decision-making processes. It must have the flexibility to set direction and pursue innovative and forward thinking strategies.”* We suggest a new Charter reflects the ambition and desired outcome from greater public accountability whilst also enabling the BBC to test and evolve our approach so it can meet changing public expectations and habits.



**‘Race Across the World’**  
Credit: BBC/Studio Lambert



**Our content and services remain one of the most powerful ways that we engage with and are accountable to our audiences.**



**Our goal is to ensure the complaints process works for the complainant and in the best interests of audiences.**

## **The role of complaints in public accountability**

As a universal and publicly funded institution, it is essential that people can easily raise concerns and that they can have confidence that those concerns will be addressed properly. There are a range of mechanisms through which the public and other stakeholders can complain about the BBC. The process differs depending on the nature of the complaint, with separate procedures for editorial complaints, general complaints, and TV Licensing complaints; for complaints about the allocation of Party Political Broadcasts; and for regulatory complaints. Whatever the subject matter, the same principles apply: the process should be easy to understand, accessible and timely. Above all, we try to resolve all complaints satisfactorily.

The BBC Board is responsible for oversight of the complaints framework and procedures. Ofcom provides independent scrutiny and an important route of appeal. For TV Licensing complaints there is a right of appeal to an independent ombudsman. The content and services that the BBC delivers outside the UK have a different regulatory framework to the UK Public Services. As the UK regulator, Ofcom does not have a role in the BBC's content or services provided overseas. However, all BBC content adheres to the same high-quality standards.

We will always strive for the highest standards in what we do. But with the volume of output we produce, mistakes will happen. We recognise that it is how we deal with those mistakes as a corporation, transparently and fairly, that is vital.

Our goal is to ensure the complaints process works for the complainant and in the best interests of audiences. To that end, we propose that the Director-General, as Editor in Chief, should retain the ability to fast-track significant editorial issues and ensure that editorial breaches are resolved expeditiously. The process must also operate efficiently for the BBC and the regulator.

Reviews of the current 'BBC First' approach to dealing with editorial complaints have found that it works well. An Ofcom Mystery Shopper report from 2024 found that changes made to the process in 2022 were delivering well for audiences,<sup>14</sup> and the Mid Term Review of BBC Governance and Regulation (MTR) found that the BBC First model '*continues to deliver the outcomes it was intended by the Charter*'.<sup>15</sup> In our view the process delivers against the principles set by Sir David Clementi's Review into Governance and Regulation in 2016, and provides direct engagement between audiences and programme makers, a crucial part of BBC accountability.

Since the conclusion of the MTR, we have made additional changes, to enhance transparency and improve audience experience. And we have taken further action in response to recent high-profile errors. This includes a review at the end of last year that recommended changes to the Editorial Guidelines and Standards Committee (EGSC) to provide greater clarity over its role and reset the composition of the Committee.<sup>16</sup> The Board unanimously accepted the recommendations made.

We have also taken a range of actions in global news to strengthen accountability, clarity and editorial processes in services and rolled out new training for new editorial staff. We have made changes to the management structure and introduced a new quality assurance role.<sup>17</sup>

However, editorial complaints are an area where we seek continuous improvement, and we want to have an open debate about whether further changes are needed as part of this Charter Review. This could include whether the 'BBC First' approach will continue to be effective or risks perceptions that the BBC is allowed to judge its own conduct and whether it remains best for the BBC to lead 'Stage 2' of the editorial complaints process – the stage complainants can request if they are dissatisfied by the response of the BBC's Executive at Stage 1. We look forward to hearing public and wider stakeholder views in response to the Green Paper consultation and discussing the options further.



**The challenge is not simply to publish more information, but to publish the information that matters most in ways that audiences can easily access and use.**

## Transparency and explaining decision-making

As a public service broadcaster funded by £3.8 billion of public money, we have a responsibility to be transparent about how we operate, and how we meet our obligations to serve audiences. Transparency is fundamental to public trust and, as the Green Paper recognises, the BBC already publishes a wide range of material. Some of that is a requirement under law and some under the Charter and Agreement.

Not all the information we publish is targeted at the general public. We must be transparent to fulfil broader public accountability objectives – to allow staff, policy makers, regulators, researchers and competitors to understand our decisions and performance. This includes:

- **Governance:** Board minutes, membership, minutes and Terms of Reference of Board sub-committees
- **Delivery against our regulatory requirements and how we serve each of the UK's nations:** The Annual Report and Accounts (ARA) and the annual Delivering our Mission and Public Purposes report (DOMAPP)
- **Our staff:** Detailed workforce data in the ARA including staff demographics and diversity and pay gaps, as well as pay and expenses
- **Our future plans:** Through the Annual Plan, Across the UK Plan and Diversity and Inclusion Strategy
- **Services:** Information about changes to our services and the Public Interest Tests (PITs) we undertake on material changes
- **How we operate:** Policies on operational separation and the fair trading rules that are in place between our commercial subsidiaries and the public services
- **Editorial standards:** Our published Editorial Guidelines standards, along with information about the number of complaints that we receive and how we resolved them
- **Freedom of Information:** In 2025 we dealt with 2,061 requests, and each year over the last decade we have exceeded the Information Commissioner's Office (ICO) target of dealing with 90% of requests on time.

We share the aspiration of the Green Paper to make sure that audiences can understand what decisions we have made and why. Transparency requirements should balance the operational costs to the BBC against the impact and value to audiences. The challenge is not simply to publish more information, but to publish the information that matters most in ways that audiences can easily access and use. In addition, to remain competitive and responsive in a fast moving media environment, we need a framework for transparency that has clear standards without creating a duplicative or ineffective process.

Our engagement with audiences and the MTR emphasises that how we communicate is as important as what we publish. The potential of technology gives us new opportunities to present information in a more appealing and accessible way. We want to continue to explore how our communications with the public can evolve and support greater understanding and engagement in how the BBC operates.

# Independence

The BBC’s independence is fundamental to public trust and our ability to deliver our mission. The BBC must be, and be seen to be, free from undue government, political or commercial influence in its editorial, management and strategic decisions. Independence is not a constitutional technicality; as the Green Paper makes clear, it *“enables the BBC to operate flexibly and remain a key player in an evolving and competitive market place and is a core tenet of its ability to inform and educate the public. It allows the BBC to hold public institutions to account, and ensure its content is not dictated – or perceived to be – by politics, the State or commercial interests”*. Safeguarding independence is inseparable from ensuring the BBC remains a national asset that strengthens the fabric of the UK and drives economic growth.

We also know that this is a priority for audiences. ‘Our BBC, Our Future’ sent us a clear message: 91% of the 872,701 respondents said it is important that the BBC is independent from the government of the day. Yet only 43% believe we are effective in this area now.<sup>18</sup> This gap between expectation and perception matters. If the BBC is to sustain trust, the new Charter must address not only the reality of its independence, but how visibly that independence is embedded in its constitutional, governance and funding arrangements.

Taken together, the constitutional reforms we propose below will strengthen the BBC’s independence as an institution. It is only through bold action that we can protect trusted information, support democratic life and sustain our mission to serve the public for generations to come.



Jo Whiley delights audiences with a DJ set at ‘Radio 2 in the Park’  
Credit: BBC/James Watkins

“

The BBC must be, and be seen to be, free from undue government, political or commercial influence in its editorial, management and strategic decisions.



**The current Charter model creates a constitutional and operational vulnerability that no other national institution faces.**

## **Charter end date and the role of the public in determining the existence and future shape of the BBC**

The BBC is one of many public organisations established by Royal Charter,<sup>19</sup> but it is distinctive in one crucial aspect: the BBC's Charter has an expiry date.

As far as we are aware, that makes the BBC's Charter unique. Other Charters that establish companies or institutions (for example the Bank of England, the British Film Institute, the British Council) do not include such an extraordinary clause by which the chartered entity can cease to exist. While their Charters can be surrendered, amended or revoked, doing so requires an active policy decision, typically subject to scrutiny and debate.

BBC Charters have typically lasted for ten years. At the end of each Charter, if no new Charter has been put forward by the government of the day, the BBC ceases to exist, regardless of the views of the public or Parliament. This creates an existential threat – the public could lose its national broadcaster due to inaction or apathy rather than an active choice supported by a public mandate. Under the current Charter, the BBC will be dissolved at midnight on 31 December 2027, with its property and assets disposed of in accordance with the directions of the Secretary of State.

As the Green Paper acknowledges, a Charter with an explicit end date creates uncertainty for the BBC and an opportunity for political interference. The current Charter model creates a constitutional and operational vulnerability that no other national institution faces. That is why we need change so that the BBC's existence is determined actively and democratically, ensuring the public and wider industry have a say.



Award-winning police drama 'Blue Lights', set in Northern Ireland.  
Credit: BBC/Two Cities Television/Matthias Clamer



Filming 'Wolf Hall'

*Credit: BBC/Playground Entertainment/Nick Briggs*

The existence of an explicit end date also has operational and commercial implications for the BBC. Many of the operational services and key broadcasting infrastructure relied on by the BBC are provided by third parties. To secure the best commercial leverage and operational stability, we require multi-year contracts. When the negotiations are near a funding settlement or end of Charter period, the supplier market often reacts by pricing in explicit additional risks, or the BBC's ability to secure discounts for longer term contracts is lost.

The next Charter should remove a fixed expiry date but also recognise the fact that the BBC has no innate right to exist. Any decision on the future existence of the BBC should be supported by a public mandate and be subject to appropriate parliamentary scrutiny. The new Charter should also ensure that the shape of the BBC, in the form of its mission, public purposes and general duties, remain relevant and aligned to the needs of each new generation with a minimum term of review. Given the BBC is designed to belong to us all, it is important that there is a clear and explicit role for the public in determining the future existence, scope and scale of the BBC.

These proposed reforms would protect the BBC's independence, enabling renewal while also giving the certainty the BBC needs to plan for the future and serve all audiences effectively.

“

The next Charter should remove a fixed expiry date but also recognise the fact that the BBC has no innate right to exist.

“

Any decision on the future existence of the BBC should be supported by a public mandate and be subject to appropriate parliamentary scrutiny.



**We recognise there is a risk around the perception of independence, and so we suggest that all future Non-Executive Director (NED) appointments to the Board, including the Chair, should follow a clearly defined, transparent and broadly consistent process.**

## **BBC board and independence**

The unitary Board of the BBC was established under the current Charter and operates in line with the principles of good corporate governance, following the Financial Reporting Council (FRC) Code of Practice where appropriate. Independent Board effectiveness reviews<sup>20</sup> have been positive about how the Board functions, and the MTR concluded that the unitary Board model was working well. Advantages of a unitary Board compared to alternatives such as two-tier Boards are commonly considered to be pace of decision making, better information flows, collaboration and oversight.

Advantages of a unitary Board compared to alternatives such as two-tier Boards are commonly considered to be pace of decision making, better information flows, collaboration and oversight. We therefore consider a unitary Board to remain the right model for the BBC.

However, we think the Charter Review does create an opportunity for further reforms to strengthen existing independence safeguards. Specifically, changes to Board appointment processes, composition and roles.

Public confidence in the independence of the BBC Board is essential. The Green Paper acknowledges that a change to the government's role in appointing Board members could enhance independence and accountability.

We recognise there is a risk around the perception of independence,<sup>21</sup> and so we suggest that all future Non-Executive Director (NED) appointments to the Board, including the Chair, should follow a clearly defined, transparent and broadly consistent process. This could be led by the Senior Independent Director, as a member of the BBC Board's Nominations Committee. As a publicly funded institution, any process should also be subject to appropriate public scrutiny – more so than the process is today.

It is important that the Secretary of State, on behalf of Government, has confidence in the process, so we suggest that it is run in line with appropriate Public Appointment principles, and that senior officials from the UK and Nations' devolved administrations have a role on the appointment panels for the Chair and Nations' NED appointments. Preferred candidates for the relevant appointments might also be subject to scrutiny by the relevant legislature, similarly to the current process for a Chair appointment.

## **Process to set the funding level**

Audience research following the 'Our BBC, Our Future' questionnaire has highlighted that the BBC's reliance on government decisions for its funding is a major factor affecting perceptions of independence. While future funding models for the BBC are discussed in Chapter 4, the next Charter is also an opportunity to introduce greater independence and transparency measures into the process for setting the funding level.



Read more in Chapter 4

At present, the government has two main financial levers over the BBC.

First, it controls the level of the licence fee. While the Charter places some broad parameters around process, there is no obligation for sufficient funding, external scrutiny or transparency and little formal role for Parliament.

Second, the government can also decide how much of the revenue collected by TV Licensing the BBC receives and – at any point and to any amount – can ‘top-slice’ the licence fee to fund other policy priorities. In recent Charters, licence fee payers have funded a range of government projects including digital switchover, local TV and broadband rollout, with the latter costing around £700 million between 2013/14 and 2019/20.

The Voice of the Listener and Viewer (VLV), which represents audiences, raised this as a significant risk to the BBC in a 2024 report, arguing that:

**‘The process for the BBC to negotiate its funding should be fully reformed so it is more transparent and accountable to Parliament and therefore the citizens of the UK.’<sup>22</sup>**

Voice of the Listener and Viewer (VLV)

The thinktank Demos also raised the lack of transparency and certainty in this process as a risk to the BBC’s independence.<sup>23</sup>

A similar risk has been raised in other countries. For example, in Germany, they have established an independent body of experts (the KEF, or Independent Commission for the Assessment of Financing of Public Service Broadcasters). The KEF provides recommendations to Germany’s Regional Governments and Parliaments on the appropriate funding level for PSBs.

There are several ways the funding process could be reformed in the UK to make it more transparent and independent, whilst also ensuring government has appropriate oversight over what is a significant amount of public funding. These include formal duties on government to ensure adequacy of funding to deliver the BBC remit, a defined role for the UK Parliament, or an external independent oversight body (as in Germany). We want to engage openly on these options and listen to others’ views.

Our objective is to find a way to improve this process in the public interest, protecting the BBC’s operational independence whilst also ensuring the funding level is subject to effective and transparent scrutiny.



**There are several ways the funding process could be reformed in the UK to make it more transparent and independent.**

“

The BBC is and should be a leader in the creative sector, holding itself to the highest standards, and setting an example more widely.

## Culture and standards

The BBC must be a place where everyone feels safe and respected, and where all colleagues can feel proud to be part of one team delivering for all audiences. The Green Paper sets an ambition for the BBC to have the highest standards for workplace culture across the creative economy. We agree.

We know that, as an industry, we face some specific challenges. It can be a pressurised environment, populated with strong personalities with high public status, and with a high percentage of freelancers and power imbalances that historically led to a lack of accountability.

The BBC is and should be a leader in the creative sector, holding itself to the highest standards, and setting an example more widely.

The Charter Review is an opportunity to embed our existing work further in the governance of the BBC. We would support setting new requirements for the Board to hold management to account on workplace culture, such as through new or enhanced roles for Board Committees. However, the Charter should not set specific requirements (e.g. precise targets or mechanisms) that impinge on the BBC's operational independence. The Board and the BBC Executive must retain responsibility for the day-to-day running of the BBC. This includes flexibility to decide the best way to discharge the requirements of the Charter.

Since May last year, we have taken decisive action in response to the independent review by Change Associates.<sup>24</sup> This includes an overhaul of our HR processes including:



Filming of 'Shetland'

*Credit:BBC/Silverprint Films/Jamie Simpson*

- **Better and faster HR support:** Introducing a new helpline to support colleagues in resolving issues early, investing in new resources to support the more complex cases, launching a new Raising Concerns intranet hub and bringing together HR teams to enable faster triaging of complaints and cases to the right centres of excellence quickly;
- **New standards, training and succession plans:** Establishing new standards with new BBC pledges that clearly state a zero tolerance for misconduct; rolling out new compulsory training for managers and introducing succession planning for the most senior on-air roles;
- **Making progress in establishing a Resolution Centre** (expected to launch in Spring 2026) which will be a centralised approach to all bullying and harassment complaints. The new centre (once fully established) will provide a single point for staff concerns and complaints within the BBC. This approach will allow us to holistically address issues raised within the BBC, whichever part of the business they occur in;
- **Committing to conducting regular, targeted culture checks within divisions;** and
- **Impacting others positively:** Leading initiatives to drive change across the culture of the Creative Industries – long-term commitments and support to wider partners (e.g. the Film & TV Charity or Action for Freelancers) to improve working practices across the sector; setting out new production partner standards; updating all our employment and freelance contracts for joiners – to include clear expectations and requirements around standards of behaviour.

The Green Paper suggests there may be a role for the BBC to triage or monitor complaints made to independent production companies which the BBC has commissioned. We do not believe this would be appropriate or effective.

We think continued improvement would best be realised through existing partnerships and initiatives. The BBC works with a wide range of suppliers, in programme-making and elsewhere – independent companies, with their own HR functions, policies and procedures. We are working with a range of partners to address the challenges we face as an industry and are making good progress, including by engaging with the Creative Industries Independent Standards Authority (CIISA) – through funding, developing and using their services, and taking part in some of their trailblazers (pilots), including on BBC flagship programmes like *Blue Peter* and the *Winter Olympics*.



**We are working with a range of partners to address the challenges we face as an industry.**





**We are committed to leading the sector in authentic storytelling by strengthening representation on air and across our workforce.**

We also have collective agreements and good working relationships with trade unions and bodies representing the freelance community in the creative sector (such as Equity, the Writers Guild of GB, BECTU, NUJ, the Musicians Union and Directors UK). We work collaboratively to ensure that good working practices between the BBC and their members are maintained, and to troubleshoot problems where needed. Through all this work we will continue to set an example of high standards, and to drive them where we can, but it is not for the Charter to dictate how independent third-party organisations are run, nor is it for government to place specific requirements on the BBC's contractual relationship with third parties.

Beyond standards and culture, the BBC wants to be a leader in wider workplace practices. We have pledged to embed representation and inclusion into everything we do, both internally and in the way we work with programme makers. Authentic portrayal on screen starts off screen, with the experiences and perspectives of those shaping our stories.

We are committed to leading the sector in authentic storytelling by strengthening representation on air and across our workforce. Crucially, this must be sustained through viable careers and long-term opportunity; without that, progress is short-lived and trust erodes. Ensuring lasting access, progression and visibility across the industry remains a core priority for the BBC. We summarise our commitments to workforce and industry diversity in the following Chapter and set out in Chapter 3 how we are increasing opportunity for all by investing in skills and building sustainable careers.

 [Read more in Chapter 2](#)

 [Read more in Chapter 3](#)

We are supportive of the Charter setting principled obligations on the BBC to be transparent to our staff and the public, to ensure high standards of behaviour in staff, and to have a workforce that reflects the UK, with the BBC retaining flexibility on how to discharge these.

Chapter 2

# Delivering services for the public good



# Overall position on the BBC's role in delivering content and services for the UK



**The BBC continues to perform strongly. UK audiences overall continue to use the BBC more than anyone else.**

People turn to the BBC for the moments that matter most – from general elections and major breaking news to major cultural and sporting events that bring the UK together.

We meet a core public need for trusted news and information, especially in times of crisis, and we offer something increasingly rare in today's media landscape: a space for communal moments, shared stories and a platform for civil debate.

The BBC continues to perform strongly. UK audiences overall continue to use the BBC more than anyone else – the BBC is the UK's number one brand for media and we reached 84% of adults on average per week in 2024/25 and 94% per month.<sup>25</sup> BBC iPlayer delivered the largest increase in viewing time of any long-form Video-on-Demand (VOD) service in the UK in 2024/25.<sup>26</sup> Our content continues to resonate. In 2025, the BBC won 30 ARIAS, 18 BAFTA TV Awards and 16 RTS Programme Awards across a wide range of categories. Maintaining a scaled UK streaming service that is competitive with global platforms is critical for the cultural and creative health of our country.

But we cannot take this success for granted. Audience behaviour is still rapidly evolving<sup>27</sup> and AI marks the biggest technological shift in a generation, reshaping how we live, connect and consume media. The Green Paper recognises that today's audiences:

**'Struggle to identify what to trust, and misinformation can manipulate public opinion, influence individual voting behaviours and generate political unrest'**

Department for Culture, Media and Sport

As we outlined in the previous Chapter, this growing crisis of trust, both here in the UK and around the world, risks serious consequences for our society,<sup>28</sup> our economy, our democratic stability and our security.<sup>29</sup>

The current situation demands that we adapt, not only to survive but to continue to thrive for the public good. We welcome the DCMS Green Paper commitment that:

**‘This Charter Review must support and empower the BBC to continue to adapt and evolve’.**

Department for Culture, Media and Sport

Our goal is to maintain a UK platform of scale and impact, entirely designed and operated in the public interest, in a market increasingly dominated by a limited number of global tech companies. We want to ensure that audiences will continue to have access to a real breadth and depth of distinctively UK stories and creativity.

To tackle misinformation and disinformation effectively, we will continue to evolve our news offer to meet audiences where they are, with local and international news and information they can trust, and giving people the skills to critically assess what they see. We want to expand our local news partnerships significantly in support of local democracy. We also have a bold new vision for global news growth, through both the BBC World Service and our commercial international news services. In an increasingly fragile geo-political context, the BBC’s role in global security, influencing inward investment and promoting democratic values has never been more critical.

At the same time, we are reimagining public service broadcasting for future generations by offering standout information, education and entertainment – delivered in fresh formats and on the platforms they choose to use, including YouTube.

The government is consulting on a vision of the BBC that has a wide range of new and extended duties. We share their ambition. However, we must also be clear that a status quo Charter will not be enough to maintain our current offer, let alone to take on new requirements. Nor should we avoid examining where we can responsibly scale back our activity.

To deliver for today’s audiences requires bold decisions, innovation, agility and growth. The BBC is ready to play its full part – not to defend the past, but to help shape the future.

“

**To deliver for today’s audiences requires bold decisions, innovation, agility and growth. The BBC is ready to play its full part – not to defend the past, but to help shape the future.**



‘The Celebrity Traitors’ 2025 Cast

*Credit: BBC/Studio Lambert/Euan Cherry*



Misinformation and disinformation flow ever more freely across social platforms.

# Trusted news and information

As referenced in Chapter 1, attitudes about the quality and impartiality of our news, current affairs and wider content offer are fundamental to public trust. The way people get their information has radically changed. Almost all adults watch, listen to or read news in some form (96%), though the way news is accessed continues to evolve, with Ofcom reporting that the use of online providers for news continues to grow, now on a par with TV which is declining.<sup>30</sup> This has had positive benefits, but it has also disrupted the supply of good quality information. Increased polarisation threatens communal trust and identity.



Read more in Chapter 1

Misinformation and disinformation flow ever more freely across social platforms.<sup>31</sup> State-backed news services of Russia, China and Iran are investing heavily in digital media and channels, spending billions of pounds to project their own messages and values. Added to this is a new threat – the distortion of news by generative AI search engine assistants. Research by the European Broadcasting Union (EBU) and the BBC found that AI assistants misrepresented news content in 45% of responses tested – regardless of language or territory.<sup>32</sup> AI is fuelling greater levels of misinformation and disinformation, with false information in both global and local issues, which can often be challenging for audiences to spot. This can drive distrust in information; news avoidance is rising;<sup>33</sup> and the ability and willingness to engage with all content in a critical fashion is falling.

PSB news counters these trends. As Ofcom has found, those who use PSBs for news are more knowledgeable about news facts, have higher levels of trust in institutions, are more likely to have voted in the 2019 general election compared with those who do not use PSBs for news, and are less polarised.<sup>34</sup> They also found that people who got a larger proportion of their online news from a PSB had a wider range of topics in their news diet and that people who made little or no use of PSBs online had a lower diversity of news topics.<sup>35</sup> People still turn to trusted brands like the BBC when it comes to checking news content online they think might be false or misleading.<sup>36</sup> We know audiences care deeply about our role in this – when we asked our audiences what they wanted the BBC to stand for, 93% of respondents to the ‘*Our BBC, Our Future*’ questionnaire said it was important that the BBC seeks to pursue truth with no agenda.<sup>37</sup>

**‘The world is facing a democratic emergency. Democratic norms are being eroded. Epistemic security – the processes by which reliable information is produced, distributed, acquired and assessed – is now intertwined with national security... Countries with media vulnerable to polarisation and capture are also more vulnerable to democratic backsliding...The BBC is therefore critical national infrastructure that provides a trusted backstop both at home and abroad. It is vital not just to our national identity and creative economy, but to our national security.’**

Demos 2025, Our BBC<sup>38</sup>

## Q Case Study



Our response in Covid-19 was a prime example of the power of the BBC in times of national emergency, with 45% of UK adults naming the BBC as their number one source for information and news on Covid-19 (with the next nearest at 13%). 84% of adults in the UK came to our services on days when important plans were being laid out. We also stepped into the breach on education, supporting millions of children and parents with learning during Covid-19, with 5.8 million browsers visiting BBC Bitesize for the first week of the launch of *Lockdown Learning*.<sup>39</sup>

Independent, accurate and duly impartial news must be the BBC’s North Star. We reach audiences, on audio and on video, on social platforms and in 43 languages around the world. From our headquarters in London, through our local, regional and National offices to our 70 news bureaux around the globe, from TikTok to the *BBC News at Ten*. 59% of adults who access websites and apps of news organisations for their news use BBC News Online, with the next nearest provider on 21%<sup>40</sup> – and the BBC News app is the most used news app in the UK for monthly reach.<sup>41</sup> 45% of UK adults say the BBC is the one media provider that does most to offer fact-checked, accurate reporting and content that people can trust – with the closest competitors each on 7%.<sup>42</sup>

“

People still turn to trusted brands like the BBC when it comes to checking news content online they think might be false or misleading.



**Looking forward, BBC News will put transparency front and centre of its offer, empowering audiences as they seek answers.”**

## **Innovation to counter misinformation and disinformation**

We are already focused on tackling the risks of disinformation: championing free, fair and accurate reporting alongside landmark investigative journalism. Ofcom research found BBC Verify was the most used and most heard of fact checker in the UK.<sup>43</sup> We want to do more to actively tackle misinformation and disinformation and give audiences, of all ages, the tools they need to critically assess the information they receive.

We are deploying new technology such as AI tools built by the BBC to help identify deepfake media, helping journalists, editors, and content producers authenticate media in real time, and we have created a ‘News Integrity in AI Assistants’ toolkit for tech companies to help them improve the accuracy of how publisher content appears in AI assistants.

Looking forward, BBC News will put transparency front and centre of its offer, empowering audiences as they seek answers. When people come to the BBC, they need to know why we cover the stories we do and how we are covering them. We will make it easier for audiences to give us their input and to see how that is heard and used by the editorial teams. And we want to deliver high-quality verification services and tools – nationally, globally and locally – ensuring audiences readily have facts about the stories close to them.

We want to make sure that audiences across the UK can find our news where they need it and in places they may be exposed to misinformation and disinformation. BBC News already reaches millions of people globally across social media and has among some of the most followed news accounts across a number of platforms. On TikTok, BBC News has 13.6m followers, on YouTube this is 19.2m, on Instagram 29.9m, on Facebook 61.3m and on X 49.6m (BBC Breaking). We are significantly increasing our presence to be the number one global news brand on video sharing platforms like YouTube<sup>44</sup> and TikTok to ensure our trusted content is cutting through the noise. This will transform our offer to make sure young people in particular, can easily access trusted news.

We are also at the cutting edge of developing technology to support transparency and information integrity, in partnership with others across the sector. We have co-developed a ‘content credentials’ feature – embedded information which will allow consumers to confirm material has come from the BBC and understand how it has been verified – and we are combining AI with trusted BBC journalism to create a new tool to empower audiences to find the facts they need to overcome misinformation.

We are also working closely with other global media organisations to ensure publishers have more control over how their content is displayed in AI assistants. This is critical to ensuring audiences can trust what they get from AI assistants.

## Supporting local news provision and democracy

As the Green Paper recognises, the BBC plays a critical role in providing local news for all parts of the UK and supporting the wider local media ecosystem through partnerships with local journalism.

The local media sector is facing serious challenges. Ofcom has found these include changing audience behaviour and funding pressures, the decline in print and TV advertising revenues that are not offset by digital advertising revenues and rising costs.<sup>45</sup> Audiences still value it highly – the use of local news is extremely prevalent in the UK.<sup>46</sup> But while audiences still trust news from established sources such as the PSBs and local newspapers, they do not always use the sources they trust the most.<sup>47</sup>

The BBC's local news provision is an essential bulwark against these trends. We operate sites and editorial teams providing local radio, TV and online news across all four UK nations, the Channel Islands and the Isle of Man, giving us proximity to those we serve. Looking at overnight performances, the BBC's 6.30pm news programme regularly delivers greater audiences than any other TV news offer in the UK. We support local democracy, scrutinising the democratic processes in the devolved nations and local government, and connecting local communities with the issues that matter to them.

Together, the BBC, PSBs and commercial news (local and national) are vital parts of the fight against disinformation. Evidence from the UK and Europe suggests that public service news and commercial news are mutually reinforcing.<sup>48</sup> A BBC which is sustainably funded under a new Charter and provides a strong, audience-led BBC local news offer should stimulate demand for local news consumption. Over the last 10 years we have funded the Local Democracy Reporting Service (LDRS) – established at the previous Charter Review – which has published more than 530,000 stories, supporting the journalism of more than 230 commercial media organisations across the UK and ensuring every local government is held to account.

We take pride in hosting a civilised debate and want to find new ways to bring audiences into a national conversation. The BBC has a strong track record on TV, radio and online, from *Question Time* to Radio 5 Live phone ins, to *Your Voice Your Vote*. We want to do more to enable audiences to more directly hold power to account, through a broad news agenda which reflects the questions being asked in every part of the UK.



**Under the next Charter we want to build our existing local partnership work to enable local news to thrive in a digital future.**



**The BBC plays a crucial role in building the UK's reputation overseas and supporting resilience against hostile state narratives across the world**

Under the next Charter, we also want to build our existing local partnership work to develop our services in line with audience need and enable local news to thrive in a digital future:

- We will make a renewed commitment to linking to other local news providers and ensure that our audiences can find their content from our sites. Setting a target of 50 million referrals a year from BBC Nations online content to the websites of Local News Partners
- The pooling of resources around big or long-running public interest stories – for example public inquiries in local areas
- A commitment to regular ad-hoc editorial collaborations with local news providers and the establishment of a local investigative network to support more in-depth journalism, being responsive to changes in audience behaviours and fast-changing technology
- A demand-led approach to syndication of published material and increasing our linking and referral to local news providers
- A range of other projects building out archives, apprenticeships, secondments and expanding LDRS reporters and coverage to reflect local government devolution in England and infill in underserved areas where there are low numbers of LDRS reporters per head of population



Chris Kamara, James Sills and Lesley with the Bantam of the Opera Choir  
*Credit: BBC*

### **Leading in global trusted news – the BBC World Service**

The BBC plays a crucial role in building the UK's reputation overseas and supporting resilience against hostile state narratives across the world.<sup>49</sup> We are the most trusted international news provider globally, and BBC News had an international weekly audience of 418 million people in 2024/25.<sup>50</sup> We are this country's most recognised cultural export internationally with 76% of influential audiences around the world having heard of BBC News – higher than any other British cultural export including British sports, films and universities.<sup>51</sup> The BBC also influences UK inward investment – for example, business leaders that consume BBC news are more likely to invest in the UK, use British goods and suppliers and visit the UK.<sup>52</sup>

Through open-source media intelligence provided by BBC Monitoring, the UK has access to a depth of analysis across global themes – from jihadism and disinformation to geopolitical and security risks. And the independent charity, BBC Media Action, works with funding partners to support the provision of trustworthy information and media literacy education to audiences, as well as supporting hundreds of local public interest media around the world.

We operate in a global context where there is continued erosion of public media and where state actors are making large-scale investment in spreading disinformation. The influence of non-democratic countries is rising, with Western countries viewed less favourably than four years ago, and preference for democracy falling across multiple countries.<sup>53</sup> In these polarised times, press freedom around the world is dramatically declining with journalists blocked or coming under fire for simply doing their job. The BBC now has over 300 journalists operating in exile.

We know that government is faced with difficult choices, but the BBC World Service influences security, UK investment and global development whilst delivering value for money. It remains a beacon of trusted, impartial and independent journalism across the globe.

For the first 80 years of its existence the BBC World Service was funded by government<sup>54</sup> before the cost of both the World Service and BBC Monitoring was transferred to licence fee payers from 2014. As costs and pressures on licence fee income increase, the World Service has been required to make significant savings, to close platforms and reduce our offer, with a serious impact on audiences.<sup>55</sup>

Where the World Service has retreated, state-funded media operators have stepped in. For example, within months of the World Service having to close its BBC Arabic radio channel in Lebanon as part of necessary cost savings, the Russian media company Sputnik began broadcasting an Arabic-language channel on the same FM frequency.



**The influence of non-democratic countries is rising, with Western countries viewed less favourably than four years ago, and preference for democracy falling across multiple countries.**



**'BBC Dars'**

*Credit: Jeff Overs/BBC*



**Funding of the World Service should move back to the UK government and include safeguards so that future funding is secure and stable to allow long term planning.**

The World Service needs a long-term funding solution that guarantees sufficient and stable funding to protect the UK's interest in the service. The Green Paper rightly recognises the value of *'a sustainably resourced World Service that provides trusted news and projects our democratic values internationally'*. The current arrangement leaves it vulnerable to the BBC's wider financial challenges and does not allow long-term planning or support the effective delivery of a strategic vision.

Funding of the World Service should move back to the UK government and include safeguards so that future funding is secure and stable to allow long term planning. Similarly, we think the UK government should revert to paying directly for the open-source intelligence services it receives from BBC Monitoring. A new funding model would give us the stability to stay ahead of fast-moving information threats.



**Carine Torbey reports for 'Global Eye'**  
*Credit: BBC*

We could go further. With government support through the next Charter and a sufficient and stable funding settlement, we could invest in strategic expansion, to support truth and media literacy and protect our audiences wherever they find our journalism. We could deliver substantial growth across all our regions – a necessary condition for impact and influence for the UK and launch new activity in geopolitical and security hotspots.

We stand at a critical moment for the UK's global influence. In this Charter Review, the government could signal a new era for British security, trade and influence by safeguarding World Service funding for the future and revitalise UK influence around the world.

## Media literacy

Across every generation, people want the knowledge, confidence and critical tools to navigate an information environment that is faster, noisier and more complex than ever before. The Green Paper recognises a key role for the BBC to provide leadership and facilitate collaboration in media literacy.

Parents and teachers tell us that navigating the digital world is becoming harder. The 2025 England Curriculum Review highlights the changing world for children and trends in digital information which ‘demand heightened media literacy.’<sup>56</sup> Parents and teachers need more tools to help children navigate their online journeys. BBC research finds that 60% of teachers have appetite for more resources in helping children identify misinformation and 56% want more resources for identifying reliable sources.<sup>57</sup> More than seven in ten (72%) parents are concerned that their child would be unable to distinguish between the real and the fake online.<sup>58</sup>

The BBC is committed to providing content and services that help people understand and engage with the world around them – from core news provision to specialised verification initiatives, and from children’s education to informative content for adults. Audiences look to the BBC to help them understand and engage with the world around them.

Ofcom has noted that BBC content contributes to audience understanding of complex issues – a core aspect of media literacy.<sup>59</sup> Younger audiences (16-24) consistently rate BBC News highly for trustworthiness (67% of regular users). Among adults overall, seven in ten say the BBC provides news and information that helps people understand UK and world events, and seven in ten regular users rate BBC news content highly for accuracy across TV, radio and online.<sup>60</sup>

The BBC provides several resources to support under 16’s media literacy such as *Bitesize Other Side of the Story* which helps children navigate fake news and misinformation and be more critical and curious about content. We also embed media literacy themes into our content, making learning accessible and engaging – for example, around Safer Internet Day, *Horrible Histories* created videos on historical rumours to illustrate fake news risks; as part of BBC Scam Safe Week *EastEnders* featured a storyline exposing online scams.



BBC’s ‘UNBOXD’ Live event in Birmingham invited young audiences to step inside the shows, stories and creative worlds they love

*Credit: BBC*



**The BBC is committed to providing content and services that help people understand and engage with the world around them.**



Our intention is clear: the BBC should be a trusted presence in schools, empowering children, teachers and parents with the tools to understand, question and thrive within the new information ecosystem.

### Q Case Study



The BBC plays a vital role in being a trusted destination for advice, insight, and engagement for all audiences as technology changes. In March 2026, the BBC's AI Unpacked week runs across TV, iPlayer, Radio, Sounds and online. Building on the BBC's work on educating UK audiences about AI and its place in society, we will showcase a week of programmes to tell the stories of AI, and explore what AI means for audiences – from a three-part documentary, *AI Confidential with Hannah Fry*, to an AI storyline in *EastEnders* about the risks of a reliance on AI software in relation to grief. And from a CBeebies *Parenting Download* exploring how families can use AI safely at home, to BBC Panorama's *Will Robots Take my Job?*<sup>61</sup>

As technology changes, we can go further. Our ambition is to reach more children with a modernised education and children's offer – media literacy is central to that. We support the introduction of media literacy in the classroom curriculum, and will work with the Department for Education, education departments of the devolved administrations and other partners to ensure that every child is equipped with the knowledge, confidence and critical skills needed to navigate today's rapidly evolving media landscape. Our intention is clear: the BBC should be a trusted presence in schools, empowering children, teachers and parents with the tools to understand, question and thrive within the new information ecosystem.

We agree with the Green Paper that we have a critical role to play. We support the proposal to update the public purposes with an explicit reference to media literacy and countering disinformation.

# British storytelling – the BBC’s role telling a unifying national story

Our commitment to backing homegrown storytelling and representing the whole of the UK is unique in its ambition, scale and impact. For more than a century, the BBC has told and reflected the story of the United Kingdom to itself and to the world. We operate in a landscape of increasingly globalised content and concentration of commissioning power among a small number of global streaming services. Only around one fifth of content watched on YouTube in the UK is produced in the UK, with the majority of viewing of content from North America. The jeopardy is high for homegrown content that tells unique stories of the UK as a whole, and its nations and regions, and that serves the needs of the UK public of all backgrounds and ages.<sup>62</sup>

## Q Case Study



In 2025, women’s sport took centre stage with a stellar lineup of major sporting events, all live on the BBC, and telling the homegrown stories that matter, of resilience, passion and triumph. The Women’s Euros reached 22.8 million people on BBC TV/iPlayer, and we reached young and female audiences especially (on platforms including TikTok),<sup>63</sup> with a ‘Names Will Be Made’ campaign that spotlit female athletes, and a season woven into other genres, like topical scripted moments on *EastEnders* reflecting sporting successes and content across *Bitesize* and *CBBC*. We also worked in partnership with external organisations to deliver this content, including providing links for viewers to discover how to participate in the sports they had seen.

“

The jeopardy is high for homegrown content that tells unique stories of the UK as a whole, and its nations and regions, and that serves the needs of the UK public of all backgrounds and ages.



We deliver high-quality and diverse genre programming, keeping children in touch with UK culture and the world around them.



The BBC is the UK's biggest cultural partner and most ambitious creator of original arts programming.

The commitment to homegrown storytelling runs throughout our content.

- **Children's:** We deliver high-quality and diverse genre programming, keeping children in touch with UK culture and the world around them. The BBC is the number 1 global commissioner of children's content, creating more titles than anyone else in 2024/25, delivering 340 hours of original children's programming – we are the only UK broadcaster in the top 10 of global commissioners. We are the only UK brand in the top 5 most used for media by UK under 16s – 70% of whom used BBC TV/iPlayer, Radio or Online on average per week in 2024/25.<sup>64</sup> Our Bitesize educational content is tailored to the distinct and differing curriculums and qualifications in the nations. We commission over 50 individual titles each year portraying life across the UK, including dramas such as *Crongton*, *Malory Towers* and *The Dumping Ground*; comedies like *High Hoops*, *Pickle Storm*, *Waffle's After School Club* and *The Football Fantastics*; and factual series such as *The Football Academy*, *Horrible Science*, *Blue Peter* and *Operation Ouch!* The much-loved *Balamory* is set to make its long-awaited return in the Spring.



CBBC's 'Gifted'

Credit: BBC/Gifted SPV Ltd/Graeme Hunter

- **Arts, Culture & Music:** The BBC is the UK's biggest cultural partner and most ambitious creator of original arts programming. Audiences spent more time watching arts programming on the BBC than all the other broadcasters and streamers combined in 2024/25, and each year we make available a total of 28,000 hours of arts, classical music, and culture content. Last year we partnered with 163 organisations working on arts projects and content. The BBC plays an unrivalled role in helping musicians and artists get their first break, through initiatives like *BBC Introducing*, providing expert support and offering exposure through national broadcast channels and events. We are the biggest commissioner of new music in the UK. The BBC Proms hosts 3,000 artists each summer in the world's biggest classical music festival, with over 70 concerts across an eight-week period. Our work supporting emerging classical composers and musicians is not centred solely in London with the BBC Scottish Symphony Orchestra, the BBC National Orchestra of Wales, the BBC Philharmonic and our partnership with the Ulster Orchestra.

- **Factual:** We bring audiences an unrivalled breadth and range of distinctive, high-quality factual programmes. From *Wild Isles* and *In Our Time* to *Sliced Bread* and *Pilgrimage*; programmes which inspire, spark curiosity and help audiences make sense of their world – from climate change to the technology revolution we are all living through. In 2024/25, BBC Science TV reached 55% of the UK population, and many millions via our audio and online content, and last year over half the population came to our natural history content.
- **Sport:** We bring sport to the widest possible audience, from the biggest international events to the occasions etched into the history of our local communities. In a world increasingly dominated by global sport content providers, where rights inflation continues to soar, the BBC’s ongoing ability to bring together tens of millions of people as part of our national story is a precious asset worth protecting. In 2024, the BBC showed 1% of all sport broadcast hours in the UK but had almost 40% of total sport viewing. The BBC is also the exclusive home for Scotland, Wales and Northern Ireland men’s international football matches in the run-up to the FIFA Men’s World Cup 2026. And because of our deep connection with our audience, across a range of services, we are able to inspire people and champion undervalued sports through our editorial expertise, high-impact campaigns, and participative events, working with partners across the UK to drive positive societal impact.

“

We bring audiences an unrivalled breadth and range of distinctive, high-quality factual programmes.

“

We bring sport to the widest possible audience.



‘Ben Youngs Investigates’  
Credit: BBC/Jack Boniface

- **Scripted:** Across drama and comedy, scripted programming has a unique power to reflect our lives. Shows like *The Archers*, *Blue Lights*, *Riot Women*, *Waterloo Road*, *Shetland*, *Two Doors Down*, *Death Valley*, *Wild Cherry*, *Smoggie Queens*, *Juice* and *We Might Regret This* reflect culture in all corners of the UK and tell stories which travel to millions more around the world. In 2024/25, we delivered 585 hours of TV content set in and portraying specific areas of the UK.
- **Entertainment:** from Radio 2 breakfast to *The Traitors*, the BBC helps connect audiences through shared experiences which connect us and enrich our culture. *Strictly Come Dancing* is a part of the fabric of our national conversation – reaching millions of audiences each year, celebrating inclusion and has generated over a billion pounds in sales across the world.

In 2025, audiences across the UK got involved in a range of BBC backed activity and raised almost £50 million overall, including £11.5 million from individual donations during the Radio 2 Sara Cox Challenge. Funding reaches children and young people through organisations based in nearly every local authority across the UK (98%); currently funding 1,600 projects and supporting 368,000 children and families, addressing the most urgent issues including poverty, mental health and disability.

### Q Case Study



BBC Children in Need is the BBC's UK charity, dedicated to funding local charities and projects that support children and young people. Each year, the Appeal inspires children, families and adults nationwide — with an estimated three quarters of primary schools and around one third of secondary schools participating each year.

## Representing the UK

The BBC is committed to telling the story of the UK and reflecting people and their experiences back to them, wherever they live and whatever their age, background, interests or circumstances. Ofcom found that two thirds (66%) of viewers said BBC TV channels provide ‘programmes made for UK audiences’, with around seven in ten (72%) saying the same for BBC iPlayer.<sup>65</sup> But in response to the ‘Our BBC, Our Future’ questionnaire audiences told us we need to go further. 76% of respondents said that it is important for the BBC to reflect people across the UK and different parts of the UK, but 51% said the BBC is currently effective at doing this.<sup>66</sup>

We know that a workforce that reflects the UK population is critical to delivering content that authentically represents and portrays the people we serve.

The BBC was the first media organisation to set itself a goal for the proportion of its workforce from working class backgrounds.<sup>67</sup> We have consistently shown industry leadership in championing diversity on and off-screen. We were directly involved in the establishment of Diamond, the industry standard for diversity reporting in programme-making, which now requires all suppliers to have a diversity and inclusion policy in place. We have also committed to:

- Spend a minimum of £80 million per year of our commissioning budget across television and radio on content that meets our creative diversity criteria, with a focus on programmes where diverse portrayal, topics and storytelling on-air are aligned with strong representation in the company’s leadership and senior production roles
- Grow off-screen representation by asking all our producers to ensure 25% of their production team are from underrepresented groups and adopt our inclusive production principles to foster an inclusive culture in all our productions
- Improve the representation of deaf, disabled and neurodivergent people in Network television

We also know we make our best decisions when they are made closer to the audiences we serve. Our *Across the UK* programme has moved roles, programming and decision making across the UK’s nations and regions to better reflect and represent our audiences. As a result, the BBC spends more than 60% of its network TV budget in the nations and regions, which not only helps us to distribute the economic benefit across the UK, but also to be embedded in – and tell the stories of – the whole of the UK.



**A workforce that reflects the UK population is critical to delivering content that authentically represents and portrays the people we serve.**



Under the next Charter, we would like to be able to do more to represent the Nations and Regions across the whole of the UK.



#### Filming of 'An t-Eilean'

*Credit: Black Camel Pictures/BBCAlba/John Maher*

Under the next Charter, we would like to be able to do more to represent the whole of the UK – it is vital in staying relevant to and being valued by audiences. This includes:

- Maintaining a broad and effective approach to representation across our content and services – from Children’s programming, to backing British film and showcasing major national events
- Building on our recent Thematic Review on Portrayal and Representation. We want to go further in ensuring all parts of the UK are authentically and fairly portrayed in our output – including increasing the proportion of our spend on portrayal, developing the diversity of who presents our programming on air, and better measuring how well we are doing
- Moving closer to our audiences. BBC content will increasingly be commissioned and produced closer to the audiences it represents – with the majority of commissioning roles to be based across the UK, and renewed support for local producers and on-air staff
- Innovation in how we tell stories which represent audiences – working with creators around the UK to give a voice to more locations and communities – and developing new formats, exploring user-generated and creator content


The BBC is the cornerstone of the UK’s creative economy. In our response to Chapter 3, we set out how we keep the creative sector strong and diverse by investing more in original British content than anyone else, training and supporting new talent for everyone, while ensuring our economic impact is felt across the nations and regions. We will work in lockstep with our partners across the sector to drive its continued success.

The next Charter needs to provide a futureproof framework for the BBC that enables us to adapt effectively to changing audience needs. We think that Ofcom should have appropriate flexibility and discretion to set the operating licence, including any genre specific requirements. We want to continue discussion with Ofcom and other stakeholders on how the licence should continue to evolve with a focus on positive outcomes for audiences.

## Supporting minority languages provision

The BBC has a long history of supporting the minority and national languages of the UK through our output and services, often in partnerships with other organisations. Minority languages are an important part of homegrown storytelling and making sure people across the UK are represented. In the context of the Charter, ‘regional and minority languages’ are defined as Welsh, Scottish Gaelic, Irish and Ulster-Scots. The BBC also provides content in Cornish and Scots.

The BBC works with valued partners such as UK screen agencies (see our section on partnerships below), MG ALBA, S4C, Sabhal Mòr Ostaig and Cornwall Council – to boost regional production, develop talent, fund content across the Nations and English regions and bring audiences a more diverse offer.

 [Read more in Chapter 3](#)

The BBC has a strong track record in backing homegrown storytelling and supporting education, culture and communities. We have broadcast content in Welsh and Gaelic for over a century. During this current Charter period, we made reaching new and less-fluent Welsh speakers a priority, launching BBC Radio Cymru 2 as a companion service to the main BBC Radio Cymru station, broadcasting a music and entertainment service. The BBC also works with partners to provide digital content in Welsh, and in January 2026, announced a major partnership with S4C to enhance the channel’s prominence on iPlayer. In Gaelic, BBC ALBA broadcast *An t-Eilean / The Island*, a major new drama, alongside key cultural content such as BBC Radio nan Gàidheal’s Òran Ùr and coverage of events including the Royal National Mòd, and support for both adult and child learners, including via the *SpeakGaelic* partnership and on CBeebies ALBA and CBBC ALBA.

In Northern Ireland, *Crá* (an ambitious Irish language drama) was a significant development and *Neil Martin: Bóthar an Cheoil* profiled the career of a remarkable musician, composer and broadcaster. *Languages of Ulster* explored the region’s distinctive language traditions and their place in contemporary life, while *Out of the Silence* profiled the work of Ulster-Scots poet Anne McMaster and the history and development of the language. BBC Radio Cornwall broadcasts *An Nowodhow*, the news in Cornish each week, and is working towards a new Learn Cornish podcast. The current Charter period has also seen the BBC fund Manx language programming on the Isle of Man’s Manx Radio service.

The BBC is committed to the continued success of our minority language provision and partnerships, which we hope to continue to grow and evolve under the next Charter.



**The BBC is committed to the continued success of our minority language provision and partnerships, which we hope to continue to grow and evolve under the next Charter.**

“

We do not have to be victims of the market – we can lead and shape it in the UK public’s interest.

# A future-proofed BBC – maintaining relevance for modern audiences

A new wave of technological changes is radically reshaping our media landscape in terms of both audience behaviour and market economics. There is a choice for government, the BBC and society. We do not have to be victims of the market – we can lead and shape it in the UK public’s interest. The Green Paper states a policy focus to:

**‘Ensure the BBC can champion technology for the public good, effectively utilise new online platforms and deploy its own digital services to fulfil its public service remit.’**

Department for Culture, Media and Sport

We support this focus and we welcome a conversation on what Charter changes may be required to enable this (see below for details of the regulatory context).

In recent years, the BBC has maintained near-universal reach in the face of fast-changing audience behaviours and the pressures of a highly competitive global media market. Under the next Charter, we want to continue to operate with the scale, scope and sophistication that the modern media market demands. This will ensure we can deliver our mission and maintain our reach among key demographics – including younger audiences.

## Public service broadcasting in an AI world

The BBC can use AI to bring audiences more personalised services that are designed in the public interest, and innovative content experiences that feel richer, more relevant and more accessible. We have explored the transformative potential of AI in content production, for example using third party tools like Descript to enable quicker production workflows; and in-house tools like the BBC’s Style Assist to help journalists save time by creating first drafts of content from the LDRS. AI gives us the chance to become more productive, more efficient, and more creative. It can improve the employee experience, free our teams from repetitive tasks, and allow them to focus on what humans do best: storytelling, investigation, creativity and connection.<sup>68</sup>

We support the Government’s ambition to bring the AI and creative industries closer together and believe that there are real opportunities for cross industry working and partnership that respect copyright and rightsholders, while also ensuring AI developers can legitimately access the content they need. We have been an active participant in seeking approaches that enable growth in both industries. Recently, we launched the SPUR Coalition with other major UK news organisations. SPUR is an industry led initiative designed to support a fair and transparent market for the use of journalism in AI systems.<sup>69</sup> SPUR and activity like it will help ensure the growth of both the AI and creative sectors; while also ensuring that the UK remains a global leader in trusted, high-quality media. To support the UK’s creative sector, the government should ensure that the regulatory framework keeps pace with developments in AI, both within the BBC’s Charter (see below) and across the wider creative industries.<sup>70</sup>

But the BBC’s responsibility goes further. We should also help audiences understand AI, its limitations, and its risks. AI literacy will be essential for navigating modern life, and the BBC is uniquely trusted to support the public in developing those skills. This can be a core part of our role in media literacy and help people to adapt to a fast-changing world.

“

**There are real opportunities for cross industry working and partnership that respect copyright and rightsholders, while also ensuring AI developers can legitimately access the content they need.**



Youth comedy drama series ‘Crongton’  
Credit: BBC/New Pictures/Khuram Qadeer Mirza



**We will prioritise investment in content and services that resonate with children, teens and young adults to ensure we continue to engage future generations. And we will meet them where they are – on the platforms that they use.**

## **Engaging future generations with a compelling offer across information, education and entertainment**

The change in audience media habits is most pronounced amongst younger audiences, including children, teens and young adults. Children are spending more time online, with 13-14 year olds now spending on average 4 hours a day online.<sup>71</sup>

We are successful in reaching these younger audiences, but they engage less than older audiences and there is much more to do. We are the only UK brand in the top 5 most used for media by UK young people – 70% of under 16s and 67% of 16-34s used BBC TV/iPlayer, Radio or Online on average per week in 2024/25.<sup>72</sup>

We should be radical in our response. We will prioritise investment in content and services that resonate with children, teens and young adults to ensure we continue to engage future generations. And we will meet them where they are – on the platforms that they use.

Our education offer will also be pivotal – we want to transform and grow a unique offer with high public value. Today, Bitesize is the UK’s leading educational website for school children, providing tailored curriculum-linked content to support students UK-wide. We are exploring how we can use new technologies, including AI-tooling in a careful and trusted way, to make Bitesize into a personalised, engaging and interactive learning experience – delivered with our own distinctive approach – for every child in the UK regardless of background. These tools will use the full wealth of BBC content to inspire learners with trusted, public-interest, distinct resources and will be available to all who require it: pupils, teachers and parents.



**'Amandaland'**

*Credit: BBC/Merman/Natalie Seery*



Cyclist Emma Finucane speaks to the BBC  
Credit: BBC/Steve Wyatt

## Reaching audiences where they want to consume our content, including on third party platforms

We will grow our own services, but also increase distribution of our content ‘off platform’. This is important in serving all audiences and requires an evolution of how we think about video sharing platforms, from being largely promotional, to a place where public service value is delivered.

Our recent strategic partnership with YouTube demonstrates our intention to make BBC content accessible to all audiences where they are. The new move will see the BBC make content primarily aimed at YouTube’s digital-native younger audience, although it will also be made available on the BBC’s iPlayer and Sounds platforms. The content will include a mixture of entertainment, documentaries, children’s channels, news and sport. The new partnership will also see the BBC and YouTube support the government’s Creative Industries Sector Plan by investing in ‘*the next generation of creators*’ across the country.

Crucial to this will be getting the right conditions with partners who can support our strategic aims. This includes prominence and attribution for a digital world, and fair terms on relevant factors like data. We – and other PSBs – want the right regulatory and policy framework to support these right conditions. We want to see the effective implementation of the Media Act, and its necessary digital media reforms, and to explore how we ensure that public service content is readily discoverable on video sharing platforms, such as YouTube as well as how UK radio and audio content similarly remains readily available where audiences expect to find it.

“

In the new world of global streaming, only a few destinations will be successful in retaining audience scale, and that there is a real danger that none of those destinations are UK owned.

“

iPlayer could be opened to other PSBs (and their commercial services), with support for their business models (i.e. advertising or subscription) whilst keeping BBC public service content advertising-free.

## **We want PSB to reach new audiences at scale – opening up our platforms and sharing resources**

It is increasingly clear that in the new world of global streaming, only a few destinations will be successful in retaining audience scale, and that there is a real danger that none of those destinations are UK-owned. Content creation is becoming increasingly democratised. At the same time, the race for scale has resulted in inflation in the cost of professionally produced content. Content distribution continues to shift to online, where UK PSBs compete directly with global technology-led, media companies; where algorithm and product strength are key success factors, rather than human-led creativity and curation.

In the BBC, we have built one of the few scaled, domestically-owned media platforms in a global landscape dominated by major technology companies. It is trusted and universally accessible. It is essential that we safeguard this critical piece of UK digital infrastructure by enabling it to leverage its scale and position to continue to support a healthy media ecology in the UK. This will help ensure that UK content and journalism remain visible and easily discoverable at scale.

We are proposing that iPlayer could be opened to other PSBs (and their commercial services), with support for their business models (i.e. advertising or subscription), whilst keeping BBC public service content advertising-free. This could help ensure the UK retains a streaming platform that competes with global services and remains a first choice for audiences. We will also explore opening up BBC Sounds to UK third parties and creators. We will do this while making sure it is clear what content audiences get from the BBC and from elsewhere, including the funding models used to support the production of that content. We will also need the right Charter conditions, such as increased regulatory flexibility, to fulfil these ambitions.

We also want to open up the underlying technology and engineering capabilities that power BBC services, creating a genuinely collaborative backbone for the UK's media sector. By sharing core systems, tools and resources with other PSBs and trusted partners, we can reduce duplicated effort, lower costs across the industry and strengthen the overall competitiveness of UK media against global streaming giants. This is about building a shared digital foundation that helps all of us innovate faster and operate more efficiently. It ensures that British stories, journalism and educational content remain visible and discoverable at scale, and that the economic value created stays in the UK – with data, distribution power and audience relationships retained domestically.

## Investing in new formats and content

As audience habits shift, public service media cannot stay tied to the formats of the past. Just as the BBC once moved from radio to television and then online, we now need to reinvent the experience again – making sure we are creating content that matters to people, in the formats and on the platforms where they spend their time.

We will push forward with new ways of telling UK stories, using low cost, digitally native formats that speak to lighter users and give us the freedom to offer more variety, take more creative risks and spotlight new talent. We will use shortform storytelling across news, sport and communities throughout the UK, but with a focus on giving audiences a sense of discovery and completion, not fatigue. We will build in more ways for people to take part, create and share around our biggest brands. We will test new formats powered by AI – starting with new ways to help people find education and news content – and we will keep evolving our live experiences across news, sport, radio and entertainment, blending audio, video, text, participation and data to create richer moments on every platform.

To make this work, we will also need to change how we produce content. In a fragmented market, we must create material that delivers value across multiple platforms. We will use new formats both on iPlayer and off-platform, bring more of our audio to life visually – showcasing the depth of our music and speech – and use new AI-driven production tools to move more easily between text and audio.



'Doctor Who'

*Credit: : BBC Studios/Bad Wolf/James Pardon*

# We need a future-proofed supporting framework to enable this change

The BBC's mission requires us to act in the public interest and this has driven strategic change in key areas – like our *Across the UK* programme and representation and portrayal changes. The approach that Ofcom and the BBC have pursued in recent years, focusing on increased transparency of outcomes rather than prescriptive inputs or outputs, has been far more effective in delivering change that works for audiences and industry.

As summarised earlier in this Chapter, we think it is right that the Charter and Agreement set out the BBC's enduring duties and obligations, and that it is for Ofcom to prescribe more specific requirements that can be adapted according to changing audience need and market pressures through wide-ranging consultation and based on independent evidence gathering and analysis.

As we look ahead to the next Charter, we want to ensure all audiences continue to benefit from a wide range of content and supporting features. We will continue to lead the field on accessibility of services. We rightly carry significant accessibility requirements and we remain open to suggestions for improvement, particularly as viewing habits continue to diversify and technology may create new opportunities.



Coronation 2023  
Credit: Jeff Overs

We welcome reforms introduced by the Media Act 2024 that modernise the regulatory framework so it better reflects an increasingly online age, particularly on updates to PSB prominence and the Listed Events regimes. We know audiences and technology will continue to change so we are working with the other PSBs, the wider sector, Ofcom and government on what further updates may be required.

More generally, we have a vital role to play in ensuring audiences – whether through our PSB partnership on free-to-access platforms, like Freely, or via BBC platforms – continue to have access to easy to use, market-leading public services that champion UK content in the public interest. As part of this and in line with the government’s ambition to future-proof the BBC, it is important that the next Charter takes a technologically neutral approach to universality and gives us appropriate support and flexibility in how we fulfil those obligations strategically. The BBC must be able to adapt in accordance with viewing trends, technological progress and cost considerations, especially as some technology becomes economically unviable with changes in usage.<sup>73</sup>

As audiences continue to adopt TV and audio distributed over the internet, the BBC stands by to support government as it considers how to manage these transitions in the best interests of all audiences. We welcome the government’s new Audio and Radio Review and look forward to working with the UK’s wider audio and radio industry to ensure UK radio remains widely available, a trusted source of news and information, and a source of companionship to millions of people.<sup>74</sup> Similarly as government considers the future of TV, alongside the other PSBs, we are ready to play our part in ensuring that the right conditions are in place, to make sure that nobody is left behind and that the benefits of digital inclusion are realised.



The BBC’s overnight US election TV results programme with Caitriona Perry and Sumi Somaskanda

*Credit: BBC/Robert Timothy*



**The BBC must be able to adapt in accordance with viewing trends and technological progress.**

## Chapter 3

# Driving growth across the UK



# Overall position on the BBC and economic growth

The BBC is vital for the growth of the UK's creative industries. Our long-term sustained investment, at scale, ability to take creative risks, nurture and invest in talent and skills and commitment to homegrown storytelling drives innovation, strengthens regional clusters, crowds in private sector investment and sustains a thriving independent production sector.

This impact is proven and felt UK wide. In 2024/25, the BBC contributed £6.5 billion to the UK economy, supporting over 77,000 jobs, with 67% of this contributing directly to the creative industries.<sup>75</sup> We worked with over 6,600 suppliers across the UK. Our investment also 'crowds in' growth across the nations and regions. When the BBC invests at least an additional 15% in an area it doubles the rate of the cluster's growth over time.<sup>76</sup>

We plan to move significantly more money and power outside of London. We want to strengthen the skills pipeline and widen access to high quality jobs across the UK's creative economy.

To maximise our impact, we need a coherent pro-growth Charter that reflects our ambition and the challenge of the market realities. We support the proposal for a new public purpose that builds on our existing duty and recognises the crucial way the BBC contributes to the economic growth of the UK's creative industries. We need a modernised and more flexible regulatory framework, so we can adapt faster, remove duplication and operate more efficiently. Crucially, we also need a sustainable public funding model because a market-making role at scale cannot be maintained on a declining base. We discuss this further in the next Chapter on funding.

In an increasingly globalised market, our role as a market-maker has never been so crucial. With a modernised Charter framework and funding reform, we can secure investment in British intellectual property (IP), increase the UK's creative skills and workforce development and sustain world class storytelling. The BBC's role in providing venture capital for a thriving UK creative sector that will benefit audiences and the wider economy could be secured for the long-term.

“

**The BBC is vital for the growth of the UK's creative industries.**

“

**In 2024/25, the BBC contributed £6.5 billion to the UK economy, supporting over 77,000 jobs, with 67% of this contributing directly to the creative industries.**



For every £1 the BBC directly adds to the economy, £3.55 is generated in the UK economy as a whole, due to the economic activity it stimulates.

# How the BBC contributes to the UK economy and creative industries

The BBC is key to the UK’s growth story. We are the cornerstone of the UK’s creative industries – investing in more original British content than anyone else, spreading our operations across the UK’s nations and regions, investing in skills and supporting a thriving production sector. As a major cultural institution and a public service used by over 90% of adults per month,<sup>77</sup> the BBC also strengthens human capital, the UK’s international diplomacy and reputation, trust and social cohesion – key drivers of productivity and economic growth.

The impact is clear. New analysis shows that, for every £1 the BBC directly adds to the economy, £3.55 is generated in the UK economy as a whole, due to the economic activity it stimulates.<sup>78</sup> Within the creative industries, the BBC’s economic contribution is particularly significant. A substantial share (67%) of the BBC’s economic contribution to the UK economy lands directly in the creative industries and 57% within the subsector of audio and visual, production and broadcasting. This means the BBC accounted for around 17% of the UK total economic activity of this sub-sector in 2024/25.

**Figure 1: Audiovisual and broadcasting sector GVA, actual versus stable public funding**



- CI subsector GVA (£m) – Actual
- CI subsector GVA (£m) – potential under stable funding

*Credit: BBC analysis, prepared with assistance EY. BBC solely responsible for presented analysis*

This contribution is powered by the long-term stability and scale of public funding. This enables the BBC to invest in a broad range of content, with a long-term view which boosts confidence, crowds in investment from the private sector and allows our supply chain to invest for the long term. Stable funding matters for growth. New analysis shows that the audiovisual and broadcasting sector would have been around £13 billion larger in 2023 if the BBC’s public funding had been kept at a steady level in real terms between 2012 and 2023. This equates to a cumulative loss of £62 billion in Gross Value Added (GVA) to the UK economy over that period.<sup>79</sup>

The way the BBC invests in the creative industries, as well as its scale, matters. We can invest in ways that the private sector is unable to do. By moving more roles and spend across the UK, the economic benefits of the creative industries can be shared more widely. Over the current Charter period the proportion of the BBC’s economic impact felt outside of London has increased while inward investment has continued to be drawn to the South East. We work with more regional and smaller independent production companies than any other broadcaster, taking creative risks in storytelling, new formats and talent. We are a major investor in skills, which boosts productivity and opens up opportunities to more people. We also invest in innovation that promotes public service values.

The BBC champions UK creativity, both at home and overseas. We invest in creating world class British content and taking it to international audiences through our commercial arm. BBC Commercial is the largest exporter of UK content, with a catalogue of 44,000 hours, 96% of it from British producers, and its titles sell to broadcasters all over the world. It was responsible for 39% of all UK TV exports last year, and 58% of UK TV exports to the US.

As set out in Chapter 2, the BBC invests to deliver for the public good, in line with our mission and public purposes. We deliver significant positive societal benefits for the UK, but evidence also shows that trust, social cohesion, soft power and an informed and educated nation are all vital for sustainable economic growth. Evidence of these impacts include:

- Using the BBC regularly significantly increases the likelihood that international investors intend to invest in the UK (by up to 13%)<sup>80</sup>
- BBC Bitesize improves the GCSE and National 5 level grade outcomes for young people who use it – resulting in higher earnings that have an economic benefit of £80 million each year<sup>81</sup>



‘Eastenders’

Credit: BBC/Jack Barnes/Kieron McCarron



**Stable funding matters for growth.**

“

The next Charter is an opportunity to put in place a new pro-growth framework for the BBC that matches our ambition to do more for the UK.

# Driving economic growth and supporting the creative economy in the next Charter

The next Charter is an opportunity to put in place a new pro-growth framework for the BBC that matches our ambition to do more for the UK. As we outline here, the BBC is already a powerful engine for growth. To unlock our full potential, the BBC needs the right framework. A sustainable funding model, as discussed further in Chapter 4, is central to this.

We welcome the proposal for a new, distinct Public Purpose for the BBC to drive economic growth across the UK and support the creative economy. This would recognise the significant role the BBC already plays.

The Green Paper also sets out several specific areas where the BBC could invest further to support growth in the creative industries. These include unlocking growth in the nations and regions, supporting independent production of all media types, increasing skills and workforce development, supporting the BBC to invest in technology and Research and Development (R&D), and building more productive partnerships. Each of these areas has potential for supporting growth, and we look forward to working constructively with government in the coming months to agree an effective legal, regulatory and financial framework that enables the BBC to deliver what the public and wider industry want and expect.



'The Agency'  
Credit: IWC Media/BBC Scotland

## Unlocking growth in the nations and regions

We have a long track record of supporting the creative industries across the UK – our bases across the nations and regions have acted as anchors for local creative economies. We have built world-class centres of excellence like MediaCity UK in Salford, Glasgow and Cardiff that attract partners and third-party investment. Within five years of the BBC and ITV’s relocation to Salford and Phase 1 of MediaCity UK’s investment in 2012, the number of creative firms registered or headquartered within a 20km radius increased by 105%.

### Q Case Study



The BBC’s long-term investment in its Natural History Unit in Bristol since 1957 has supported the growth of a world-class creative cluster. In 2022 alone, natural history production contributed 44% (£127.2 million) to the Bristol screen industry’s overall £288 million turnover. Between 2019 and 2022, 75% of BBC Natural History commissions attracted inward investment. That means, in this period, for every £1 the BBC Public Service invested, £1.86 was invested by a third party.

The BBC has a strong track record of supporting the growth of creative clusters in all parts of the UK, either through key commissions, or longer-term centres of excellence. *Doctor Who* has generated a GVA of £134 million in Wales alone, including 170 roles per series (the majority from Wales), and a wider GVA for the UK economy of £256 million and average employment in the wider supply chain of 94.5 Full Time Equivalent (FTE) jobs per series.<sup>82</sup> In Northern Ireland, the police drama *Blue Lights* generated an estimated £20 million in GVA for the Northern Ireland economy across its first two series,<sup>83</sup> and in Scotland, the *Traitors* generated £21.8 million in GVA to the Scottish economy between 2022-2025.<sup>84</sup>



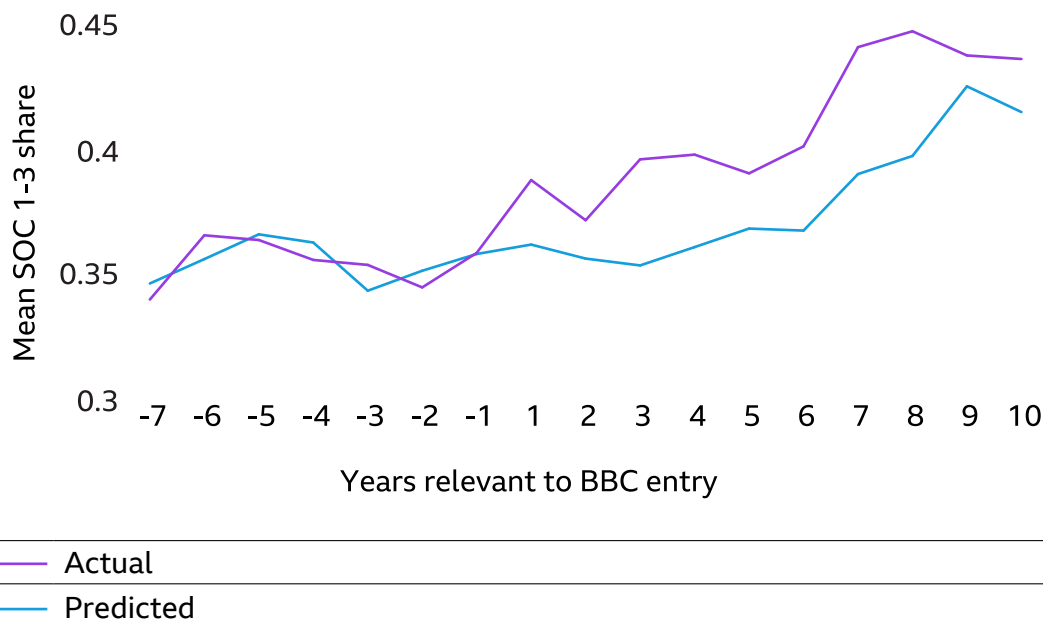
The BBC has a strong track record of supporting the growth of creative clusters in all parts of the UK, either through key commissions, or longer-term centres of excellence.



**We know that it is the scale of the BBC’s local presence that matters for cluster growth. A 15% increase in the BBC’s local footprint approximately doubles the rate of cluster growth over time.**

Without the BBC proactively pushing investment into the nations and regions, creative activity would remain concentrated in London and the South East. We know that it is the scale of the BBC’s local presence that matters for cluster growth. A 15% increase in the BBC’s local footprint approximately doubles the rate of cluster growth over time. As our presence in a cluster grows, so too does the investment of others into that cluster.<sup>85</sup> That growth translates into better job opportunities in that region. New analysis shows that five years after the BBC increases its presence in a cluster, the actual share of high value jobs (Standard Occupational Classification (SOC)<sup>86</sup> code 1-3) is about 2 percentage points higher than if the BBC had not invested.<sup>87</sup>

**Figure 2: Increased share of high value jobs (SOC 1-3) following BBC increasing regional presence**



*Credit: BBC analysis, prepared with assistance EY. BBC solely responsible for presented analysis.*

Since 2021, our *Across the UK* programme has recognised that to offer value to every licence fee payer, the BBC has a duty to make sure the views and voices of diverse communities across the UK are reflected and represented across its output. We also have had a responsibility to ensure that the economic impact of the BBC was distributed across the nations and regions of the UK, to support a vibrant creative sector in multiple locations.

By the end of the 2026/27 financial year, the BBC will exceed its £700 million *Across the UK* investment commitment and is forecast to deliver over £800 million creative investment in total. This has been achieved by locating the majority of Network Radio and TV spend outside of London and supporting a range of new regional suppliers and talent. It was the right thing to do for the distribution of growth across the UK, as well as the right thing to do for our audiences and goes well beyond the obligations in the Charter and Agreement.

To date, 400 additional roles have been created outside of London, 65% of which were recruited locally – supporting key regional and national creative clusters and improving internal culture and ways of working. Our investment outside of London has had significant and measurable economic benefit to date – for example, in Digbeth the BBC is forecast to deliver £280m in GVA by 2031, and the North East is the UK’s fastest growing production sector thanks to forward-thinking, with £65 million in GVA generated since 2020.

In Digbeth, the BBC has already made long-term commitments and investment that will fuel the long-term growth of the West Midlands creative sector.

This includes the relocation and commissioning of key returning titles such as *MasterChef*, *Silent Witness* and *Peaky Blinders*. Other BBC Group decisions have supported this creative vision. The relocation of the BBC’s Midlands HQ to the Tea Factory in 2028 places it at the heart of a new creative neighbourhood, surrounded by studios housing BBC commissions and key suppliers to the BBC, including BBC Studios and BBC Studioworks. The BBC’s long-term commitment to the West Midlands has provided the confidence for others to invest. Digbeth is now the second-largest production base for Banijay Group in the UK who have Shine, Kudos Knight and Senti Films with production offices there.

The BBC’s production partnership in the North East has transformed it into the UK’s fastest-growing production sector in the region thanks to a forward-thinking agreement with the North East Screen Industry Partnership. In the first three years of the partnership, this regional sector supported eight regularly commissioned companies, up from just one in 2021. Production investment in the region has diversified around the BBC’s investment. Today, the BBC’s investment accounts for a third of annual production spend – still the majority by value but reflecting a recent growth in commissioning spend by others, including Paramount and ITV.

The BBC has deliberately moved network teams out of London, opening up high-quality roles and career pathways in other parts of the UK. Our technology news team is now based within BBC Scotland’s headquarters in Glasgow; our Climate, Science, Growth and Social teams have moved to Cardiff and a BBC News AI team has recently been established there; and our Learning and Identity teams are now embedded in Leeds. BBC Network Audio has also created new hubs in Wales, Scotland and Northern Ireland, producing network content for UK-wide audiences while helping to grow vibrant audio markets in and around Cardiff, Glasgow, Edinburgh and Belfast. These moves ensure that the BBC’s network output is shaped by talent rooted in the nations and regions, strengthening our journalism and widening opportunities across the UK.

We have also expanded BBC Commercial’s footprint. BBC Studioworks opened and operates Kelvin Hall TV Studios in Glasgow, adding significant studio capacity and industrial strength to Scotland’s screen sector.

Investing in homegrown storytelling is essential not just for audiences, but for sharing economic opportunity across the country. It enhances growth for both local areas and the UK as a whole. We currently spend 61% of our network TV and 46% of our radio spend in the nations and beyond the M25. The commitment to spend outside of London currently outweighs all other UK PSBs, and we are committed to going further.



**Investing in homegrown storytelling is essential not just for audiences, but for sharing economic opportunity across the country. It enhances growth for both local areas and the UK as a whole.**



**Building on the government's Creative Industries Sector Plan, we see opportunity to accelerate growth in Belfast and North West Region, Cardiff City Region, Glasgow City Region, Greater Manchester, the North East and the West Midlands.**

## **Our ambition to do more to support creative clusters**

In the next Charter, we will do more to support the creative economy outside of London by strengthening creative clusters – centres of excellence that bring together talent, production, technology and investment. Building on the government's Creative Industries Sector Plan, we see opportunity to accelerate growth in Greater Manchester, the North East and the West Midlands, and across the devolved nations in Belfast and North West Region, Cardiff City Region and Glasgow City Region.

We have already signalled our long-term intent in these regions, including a new and more ambitious partnership in the West Midlands, and will embed our commitment to each priority region through new agreements with local partners. We are also open to further opportunities in emerging areas such as Yorkshire's entertainment engineering hub and the Tees Valley creative investment zone.

We see the opportunity for the UK to connect a network of creative clusters and firms to make a corridor of activity that has the scale to be internationally competitive. However, success will require investment in partnership with others. We want to collaborate with other PSBs and the commercial sector on strategic pan-regional initiatives, for example working with Channel 4 and ITV on skills initiatives across the North of England.

Focusing our efforts on a defined number of UK regional creative hubs will deliver the greatest economic and audience impact. Experience has shown that targeting the BBC's spend is the best way to sustain the growth of these regional creative clusters and achieve the long-term benefits.



**'Silent Witness'**

*Credit: BBC/ Nicola Young*

To underpin this, we have ambitious new targets for our senior leaders, commissioners and network spend outside of London to continue to grow creative clusters across the UK. Over the next Charter we would like to see the majority of our senior leaders and commissioning roles in nations and regional bases, and two thirds of all of our network content spend to be outside of London. Achieving these targets will mean moving a combination of power, production, and spend across the UK, achieving a more effective balance of creative investment and operational footprint across the UK.

This approach builds on what we have learned through our Across the UK programme to date, and a detailed understanding of the UK's key regional creative clusters and partner needs. By boosting leadership in the clusters (including commissioning roles) we can bring BBC creative, business and corporate decision making closer to audiences and our sector partners – and ensure the BBC plays a wider leadership role in connecting investment and opportunity to benefit the local economy. This will help the revenue from the licence fee be spent more effectively across the UK, increasing the volume and range of output and services outside of London in TV, radio and journalism, plus growing technology and digital capability.

If these ambitious plans are to be a success and allow the clusters to achieve their full potential in the long-term, we need the support from public and private investment. We also need flexibility. Overly prescriptive targets or quotas, requiring or mandating the BBC to install regional governance structures or further devolving budgets to specific regions could have a detrimental impact on growth due to the loss of economies of scale, creating new administrative burdens and the cost of set up for sometimes relatively small impact.

The BBC works best when the whole organisation has the flexibility to be able to adapt and compete in a global market, allowing us to change fast when market conditions change.

Overall, our investment to date has created significant economic growth for UK regional creative clusters without overly prescriptive quotas and regulated mandates. Under the right conditions we can go further.



**We plan to move significantly more money and power outside of London.**



Timothy Spall and Gwyneth Keyworth in 'Death Valley'  
Credit: BBC/BBC Studios/Simon Ridgway



**We are the single largest investor in original UK content with 99% of our original content made in the UK, investing over £3 billion in content in 2024/25.**

## **Supporting independent production across all media types**

The BBC plays a unique role in being a market-maker and setting the creative standard in the UK. We are the single largest investor in original UK content with 99% of our original content made in the UK, investing over £3 billion in content in 2024/25. We have an excellent track record of supporting small and emerging independent producers on first commissions, for example working with North East Screen inviting producers to pitch for the *One Show*, *Morning Live* and *BBC Daytime*.<sup>88</sup> Last year, we commissioned over 500 independent TV and radio production companies, far more than anyone else in the UK in terms of both volume and value.

We have a clear and strong commitment to fostering diversity and innovation across the sector. In 2024/25, we supported nearly 300 companies with paid development, and 93% of development spend went to UK independent producers. We also introduced a dedicated paid development fund for audio companies and have committed to competing 100% of new network audio commissions. We commissioned 44 diverse-led TV companies, helping to meet our £80 million creative diversity criteria across portrayal and production leadership, we introduced dedicated diversity funding to support independent audio companies and our £2 million Diversity Development Fund supported 135 individuals from underrepresented groups on over 100 productions.

We will continue to work closely with partners across the industry to support independent production further under the next Charter. In addition to sustainable funding and modernised regulation, we recommend the government review the definition of qualifying independent producers so that it fulfils its original policy intention and supports the diversity of the sector, with a focus on smaller independent UK-based producers. Additionally, we recommend the government maintain the requirement for the BBC to contest 100% of new commissions for TV and TV-like content, as it delivers value to audiences and promotes growth in the independent production sector.

## **Skills and workforce development**

The BBC is a major investor in skills, with a strong track record across the current Charter. In 2025/26, we will have invested at least £47 million<sup>89</sup> in skills provision for our staff, freelancers and industry. This includes investment in training courses, apprenticeship schemes, industry schemes and work experience. Over 2025:

- 98% of BBC staff completed one or more training course – equalling 185,861 hours of training
- We delivered industry schemes in every part of the UK, including Comedy Collective for budding comedy writers, Ignite Animation to identify new children’s animation talent, Creator Lab to develop digital and social creatives and Future Voices for aspiring bilingual journalists. In 2025 we launched our unified talent portal to help the industry more easily find and access our schemes<sup>90</sup>

- We supported 1,200 apprentices, up from 350 in 2020, exceeding our Charter commitment – the economic benefit of apprentices that have completed their apprenticeship since 2021 is £293 million
- In delivering our skills initiatives, we have worked with a wide range of partners including the National Film and Television School, universities, ScreenSkills and other industry partners
- Through our Bitesize Careers Tour we have reached 118,000 students, and more than 360 students participated in BBC ‘Get In’ work experience days

In the creative industries, investment in skills and workforce development can be uncertain and volatile. As such, the BBC’s ability to invest in skills at this scale and breadth, and with consistency, is vital. Alumni from BBC Writers now include some of the best emerging and established talent in UK television.

However, under the next Charter, our offer will need to adapt. Financial pressures on the PSBs and some areas of the UK commercial sector are causing underemployment, particularly outside of London and the South East. At the same time, AI is shaping employment and future skills in the creative sector, and the sector needs to increase representation of those with working class backgrounds. The cumulative impact is that the workforce of the future and the skills investment needed to sustain it will need to look different in the years to come.

To respond to this, we have an ambitious plan to evolve our skills offer so that opportunity can reach everyone and we can continue to play a significant role in the sustainability of skills and careers in the creative sector:

- **A bold offer for young people** – we want to double our commitment to offering meaningful career-enhancing opportunities to young people wanting to get into the creative industries. Through a broad offer of apprenticeships, T-Levels and equivalent qualifications, accredited work experience and targeted efforts towards young people Not in Education, Employment or Training (NEETs) we would aim to provide over 1,000 young people with BBC supported career development. This would be delivered with a focus on access to those in underserved areas, particularly individuals with working class backgrounds
- **Investment in every nation and region** – each of our six clusters and London would have a skills hub that would deliver bespoke initiatives that address local skills needs and build capability and capacity in the local creative workforce. This would be underpinned by strategic partnerships with leading universities, industry partners and local independent production companies (indies), strengthening the BBC’s reputation as a destination for world-class skills development. We would also offer an ‘Indie Training Guarantee’, a significant expansion of our current indie placement scheme. Working with regional authorities, screen agencies and national skills bodies, BBC-commissioned independent production companies would be offered a fully-funded apprentice or training placement



**We have an ambitious plan to evolve our skills offer so that opportunity can reach everyone and we can continue to play a significant role in the sustainability of skills and careers in the creative sector.**




**To deliver this effectively, we need to be able to evolve our offer over time to ensure it best meets industry needs.**

- **An ongoing focus on future skills** – We would prioritise skills in digital, AI, multiplatform, journalism and content production, supporting emerging talent and people from less represented groups across the industry. Learning would be made accessible through multiple delivery modes, with digital modules, face-to-face learning and placements ensuring equitable and flexible access for all, no matter where people are based

We intend to train over 5,000 people per year beyond the BBC in priority skills areas for the creative industries. We would ensure BBC staff and freelancers are provided with the training they need to deliver world leading content efficiently, maximising value for money for licence fee payers. Over the longer term, we want to roll this out to the wider industry, backed by credible certification to boost sector productivity.

To deliver this effectively, we need to be able to evolve our offer over time to ensure it best meets industry needs. We think that a public purpose for the BBC on growth, supported by the range of reporting and accountability measures outlined in Chapter 2, would allow the BBC to remain operationally independent and fully accountable for the impact it delivers through its skills investment, without constraining flexibility and innovation. This approach should also apply to apprenticeships, where apprenticeship targets could unnecessarily constrain the BBC and limit our ability to invest in new areas such as T-Levels and initiatives aimed at NEETs.

 [Read more in Chapter 2](#)

We will continue to use our platform to support emerging talent and showcase the creative industries as an accessible and viable career option, particularly for under-represented groups. As access to knowledge and skills becomes increasingly democratised, the BBC can go beyond signposting opportunities by building clear, practical pathways into the industry and the BBC itself. Working through a broad network of partners, including grassroots and community organisations, will be key to reaching under-represented communities in meaningful and trusted ways.

Collective action is vital for the sector. The scale and complexity of the challenges, from evolving media technologies to varied regional needs and career transition pathways, means that no single organisation can solve them alone. Our approach will address this – in some areas the BBC can lead, in others we are well placed to convene partners across industry, education, suppliers and other public service media. And in many cases, we will amplify the impact of other skills providers in our sector, through targeted collaboration and ensure a thriving partnership ecosystem. For example, working with Channel 4 and ITV across the North of England to join up training opportunities and support the Great North Creative economic corridor.

## The BBC's role in technology, research and development

As set out in Chapter 2, technology is transforming how people find and enjoy content, and the pace of that change will only increase. But throughout this change, the BBC's mission endures: to inform, educate and entertain all audiences. Delivering value for all.

➔ Read more in Chapter 2

The BBC has been at the forefront of adopting and pioneering new technologies in the public interest, so that we can best meet the changing needs and demands of audiences. We need to continue to adapt, utilising technologies like AI to deliver new outputs and make existing workflows more efficient and fluid. To do this effectively, we need the ability to explore, test and adopt new technologies. This will ensure we continue to innovate for audiences, and contribute to the wider industry – maintaining our commitment to sharing our research and upholding public service values, including principles for the responsible use of AI.

We are also modernising how we make and deliver our content through our end-to-end media supply chain. This will allow our teams to scale, partner, and lead – enabling the BBC to better serve audiences and customers across the UK and around the world.

“

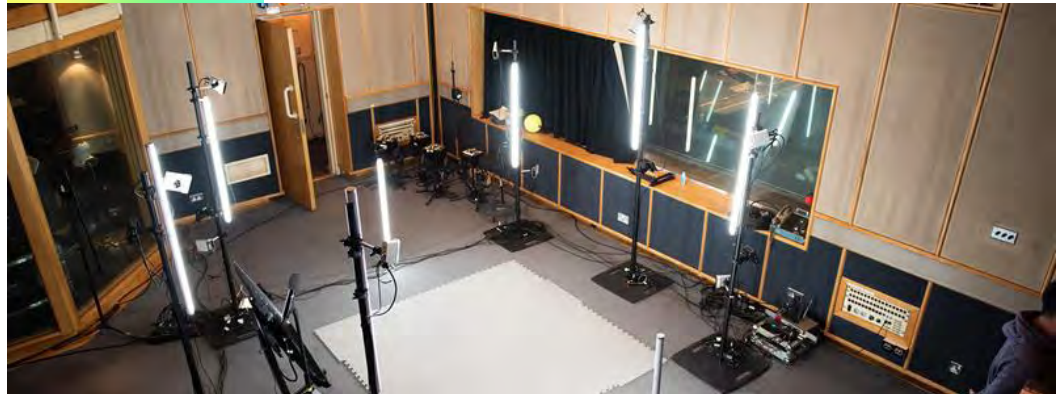
**We need the ability to explore, test and adopt new technologies.**



'Gavin and Stacey: The Finale'

*Credit: BBC/Toffee International Ltd./Tom Jackson*

## Q Case Study



The BBC has been a driving force across industry wide research and development grounded in public value. For example, the BBC is a founding member of the Coalition for Content Provenance and Authenticity (C2PA), developing new standards for Content Credentials to confirm the origin of the media people consume every day. This is increasingly important as misinformation grows and the public want confidence that content they are seeing is trustworthy. The BBC has also continued to conduct research with emerging immersive and interactive technologies on initiatives to support Children in Need and the delivery of Radio 1 gigs in virtual environments.

We remain committed to delivering innovations that serve the public and the sector, but we do not believe it is appropriate that the Charter lock us into using specific technology, approaches or tools. This would limit our ability to respond to changing industry dynamics and unexpected technological breakthroughs. It would also be inconsistent with the government's ambition to futureproof the BBC. We must continue to develop and adapt our offer as technology changes, and to do so in ways that uphold public trust and confidence, and are in the public interest.



Ellie & Vito on 'Strictly Come Dancing 2025'  
*Credit: BBC/Guy Levy*

## Encouraging the BBC to deliver more through collaboration and partnerships

Across the creative industries, scale is becoming increasingly critical. Working closely with other partners, BBC charities and PSBs is not just a choice, but a necessity, to ensure the future of British IP, creativity and talent. We support the Green Paper proposal for the BBC to deliver more through collaboration and partnerships.

Our partnerships maximise the impact and value for the BBC, our partners and our audiences. By partnering, we achieve more than each organisation could alone to support the creation of ambitious content and deliver value to audiences.

The BBC's scale and reach and the strength of our brand is important to partners, but, as well as co-funding partnership projects, we can offer valuable expertise, insight and access to facilities and equipment. Above all, it is when the BBC and its partners come together around shared ambitions and values that the most successful partnerships are made.

In 2025, we found that out of our priority partners, almost nine in ten (88%) said that they found their partnership good or excellent (up 26% from 2023), and 85% found they received at least the same value back that they put in from working with the BBC (up 14% from 2023).

Our partners are both commercial and non-commercial organisations of all sizes, across the whole of the UK, and cover television, radio and online and offline services. Our partnerships with the UK regional news industry, and ex-UK organisations such as the Nobel Prize Outreach have worked to strengthen our collective understanding of events and the countering of mis- and disinformation.

We also partner with organisations that nurture the next generation of creative technology, developing and adopting creative innovation, and delivering the high-quality, homegrown content that audiences value and demand, such as the Open University, and also in our R&D Partnerships. We value our partnership agreements with North East Screen, the West Midlands Combined Authority, Create Central, Screen Scotland, Creative Wales and Northern Ireland Screen, and we continue to collaborate closely with screen agencies and regional bodies to support production and talent development. Details of our minority languages partnerships are set out above in Chapter 2.

Our partnerships also play a core role in bringing people together for the UK's biggest national events such as Eurovision, Glastonbury, the New Year's Eve Fireworks and Hogmanay, Wimbledon, international football competitions across all four nations, RHS Chelsea Flower Show and Comic Relief. Each of these areas contribute to our economic footprint, maximising the impact we can have by working together, so the value achieved is greater than each individual organisation can contribute separately, and we are committed to this impact continuing to grow in the next Charter period.



**Working closely with other partners, BBC charities and PSBs is not just a choice, but a necessity, to ensure the future of British IP, creativity and talent.**



**A stronger partnership and greater cooperation will support our PSBs to stand out in a crowded online world.**

The UK's PSBs may be rivals when it comes to ratings, but we all share one goal: our fundamental duty is to serve people across the UK. We make diverse and distinctive homegrown television that unites the UK's nations and regions in shared cultural moments. We provide impartial news that helps safeguard our democracy. We act as the cornerstone of the UK's thriving production sector and the backbone of our creative economy.

This unique contribution makes the UK's PSBs and our creative industries the envy of the world. There has been growing support from government, industry and regulators for the BBC to have stronger partnerships with other PSBs and to work together to explore how our combined scale could better support audiences and lead to more efficiency.

A stronger partnership and greater cooperation will support our PSBs to stand out in a crowded online world. We need to work together to compete globally and continue to deliver for UK audiences. That means removing unnecessary barriers so our regulatory framework best allows us to operate efficiently within the market and work with partners in ways that are beneficial to both parties. We note that the government has written to the Competition and Markets Authority (CMA) and Ofcom in line with its commitment in the Creative Industry Sector plan. We also support the government's proposal to explicitly reference public service media providers in our general duty to enter into partnerships with a range of organisations. This is particularly important in a market that is fast paced, rapidly changing and where commercial competitors are merging and doing partnerships at pace.

### **Updating market impact regulation**

The market that the BBC operates in has fundamentally changed since the regulatory framework of materiality assessments and Public Interest Tests (PIT) was last updated in 2017. The rise of video and audio streaming services, and the consolidation and success of commercial radio have meant that the need for such regulation is less than it was when the BBC was the dominant player in the UK broadcasting sector. At the start of the



The BBC Scottish Symphony Orchestra performing at the 'BBC Proms'  
*Credit: BBC*

current Charter, the BBC accounted for an estimated 26% of video viewing time in the UK, however today it is less than 20%.<sup>91</sup> Similarly, in audio, we estimate that the BBC accounted for around 40% of listening time in 2017, but by 2025 this had fallen to around 30%.<sup>92</sup> The greatest threat to the UK sector now comes from global streaming and social media platforms which have far greater scale than the BBC or any other UK media service.<sup>93</sup>

As a unique publicly-funded player in the market, there should be a robust approval process for changes to BBC services that may have significant adverse impact on fair and effective competition. But the current process is no longer proportionate to market reality. The PIT process overseen by Ofcom works in principle, but in practice it takes too long to complete the regulatory approval process and Ofcom has also gone beyond the requirements of the Agreement on consulting competitors. On average, Ofcom takes over five months to complete its competition assessments, even where it agrees that there is little market impact, and competitors have been consulted. This limits the BBC's ability to react nimbly to the changing environment and to develop services that audiences need and want. We therefore suggest that the unnecessary regulations relating to non-material changes are removed and that Ofcom is given four months, rather than seven and a half months, to complete a competition assessment in line with its duties on electronic communications disputes.

If properly updated, we consider the single broad market impact test – currently defined as a significant adverse impact on fair and effective competition – overseen by Ofcom as the best solution. It gives Ofcom discretion to consider the different competitive conditions in different sectors and make expert judgements accordingly. By contrast, an approach that codifies in the Charter or Agreement assumptions about market conditions and the role of the BBC in certain sectors runs the risk of becoming out of date as market conditions change – and the current Charter period has shown how quickly and fundamentally this can occur.

“

**The market that the BBC operates in has fundamentally changed since the regulatory framework of materiality assessments and Public Interest Tests (PIT) was last updated in 2017.**

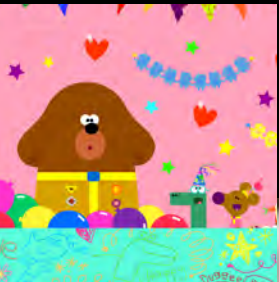


**'The City is Ours'**

*Credit: BBC/Left Bank Pictures/James Stack*

## Chapter 4

# Sustainable and fair funding



# Overall position


The BBC's funding model needs reform.

The Green Paper sets out a clear vision for the BBC not just to survive but to thrive for decades to come. Our response sets out an ambitious strategy to deliver that vision.

The Green Paper is also clear that, to deliver against this vision, the BBC requires sufficient and sustainable funding while ensuring costs are kept as low as possible to ensure any funding mechanism is fair and affordable. We agree, and this means that a new, sustainable funding framework is required if we want a BBC that is for all, and not just for some.

Over the Charter period the BBC has gone from being a service almost every household paid for and used to one that almost every household uses but millions do not pay for. 94% of adults use the BBC per month<sup>94</sup> yet fewer than 80% of households now contribute, down from over 90% in 2016/17. This fall in paying households is a result of a mismatch between TV licence rules – predicated on live viewing – and the growing popularity of on-demand consumption and video sharing platforms. This leaves a public service with universal access and consumption, but a funding model that no longer captures universal contribution.

That is not fair on those who continue to fund it, and it creates a structural imbalance that undermines the sustainability of a universal public service: the system no longer matches the universal model it is meant to uphold, leaving a diminishing number of people paying for a service designed for and made available to everyone. Without an income to support a BBC of scale and near-universal appeal, we will reach a tipping point where the public's willingness to pay begins to erode, which would inevitably push us to prioritise the tastes of those left paying the licence fee rather than seeking to provide a service for everyone.



**94%**  
of adults use the BBC per month yet fewer than 80% of households now contribute, down from over 90% in 2016/17.



**This leaves a public service with universal access and consumption, but a funding model that no longer captures universal contribution.**



**Our overall aim is to maintain a BBC for all and not just for some; and as part of a wider, healthy public service media ecology.**

In a fragmented media landscape dominated by a few international owners, as news and information splinters into personalised streams, the sense of a shared public reality starts to diminish. A universally funded BBC is one of the few institutions built to push against that drift, the UK one of very few markets where a domestic service is still competitive today and has the platform to remain competitive in the future, if it is properly backed.

Our mission is to serve all audiences, not tailor output to whichever niche shouts loudest or generate clicks through outrage. This mission still matters. Restoring universal funding, with everyone contributing, is the best way to deliver it. It gives the BBC the legitimacy to act for the whole public and in the public interest. In a time when common reference points are thinning out, allowing the BBC to weaken would only harden and widen existing divides.

There are a number of ways universal funding could be restored. Other countries such as Finland, Austria and Germany have had this debate and taken different routes to restore universal funding while taking steps to enhance fairness. The answer to how to achieve this won't be the same in the UK, and it doesn't have to look exactly as it did in the past. What matters is that the conclusion of this process is fair, sustainable and future proof.

We welcome government consulting widely, encouraging new ideas and radical thinking. It is only by thoroughly testing these ideas, understanding their consequences, weighing up the inherent trade-offs and what they mean for the content and services we can offer, that we will arrive at the best answer for the UK. Our overall aim is to maintain a BBC for all and not just for some; and as part of a wider, healthy public service media ecology.

There is no silver bullet that will secure the BBC's financial future. In 2024/25, the licence fee provided over 85% of funding for our public services and other responsibilities including the World Service. Therefore, reforming the model is an essential step to a sustainable BBC in the longer term. But we know we will also need to continue the drive for greater efficiency to make every pound we earn work harder, as well as looking at how we can grow our commercial returns, enabled by appropriate access to capital for BBC Commercial. That is why our starting point is that we need transformation and reform across the main areas that the main Green Paper highlights.

- We will continue to radically transform our operations to drive efficiency and deliver more value for audiences. Squeezing value out of every pound of income we receive and by the end of the Charter, we will have delivered over £2 billion in total savings
- We can deliver more from our commercial operations. We are asking for government to make changes to our regulatory regime and enable more flexible access to capital to help unlock some of the current constraints on commercial growth. This is an essential complement, but not an alternative to, public funding reform
- We need a modernised public funding mechanism that can support a universal public service. One that is fair and affordable, sensitive to the pressure on households from the cost of living and fits with a modern media environment. This should include options to ensure collection and enforcement is fair, proportionate and effective

- We are also asking government to find a long-term funding solution for the World Service that guarantees sufficient and stable funding to protect the UK's interests overseas

We recognise none of these reforms are easy. But facing up to the choices ahead is essential if we want the UK and UK audiences to continue to benefit from a universal national broadcaster with a unique public service mission and global relevance. With the right reforms we can continue to: pursue truth with no agenda, providing local, national and global news of the highest quality; showcase homegrown storytellers, from the writers of *Blue Lights* to the emerging artists getting a first break on their local station; and bring the nation together for the moments that matter, from the *Olympics*, *Wimbledon*, the *Proms* and the *3*. Only the BBC can deliver this, and so much more.

In doing so, we can support our national security and resilience, strengthen social cohesion, grow the UK's economy and reinforce the UK's position in the world.



**Facing up to the choices ahead is essential if we want the UK and UK audiences to continue to benefit from a universal national broadcaster with a unique public service mission and global relevance.**



**'Alma's Not Normal'**  
*Credit: BBC/Expectation TV*



Radical changes in audience behaviour have reshaped the market and driven significant cost growth especially in video markets.

# The financial context

The UK media market and financial context have changed profoundly since the BBC's Charter was last reviewed a decade ago. Audience behaviour has shifted at speed, production inflation has increased sharply, and the BBC's real terms income has fallen significantly. These pressures are structural, not cyclical – and without reform, they will increasingly constrain our ability to deliver a universal public service.

## Our cost base

Radical changes in audience behaviour have reshaped the market and driven significant cost growth especially in video markets. To illustrate, the number of hours of video content which cost us more than £1 million per hour rose six-fold between 2016/17 and 2021/22.

This is a response to audience demand. While total video viewing has remained high, we estimate that between 2017 and 2025 the total time spent with on-demand video services more than doubled and linear (live broadcast TV channels plus recorded as live) viewing almost halved.<sup>95</sup> The largest share of viewing time for under 35s is now on Video Sharing Platforms (VSPs). Audiences consume content in more diverse, personalised and on-demand ways than ever before. Global media and technology companies have tapped into economies of scale that no UK media company has access to, driving up the price of making content as they have expanded reach globally, and driving down the price of selling it.

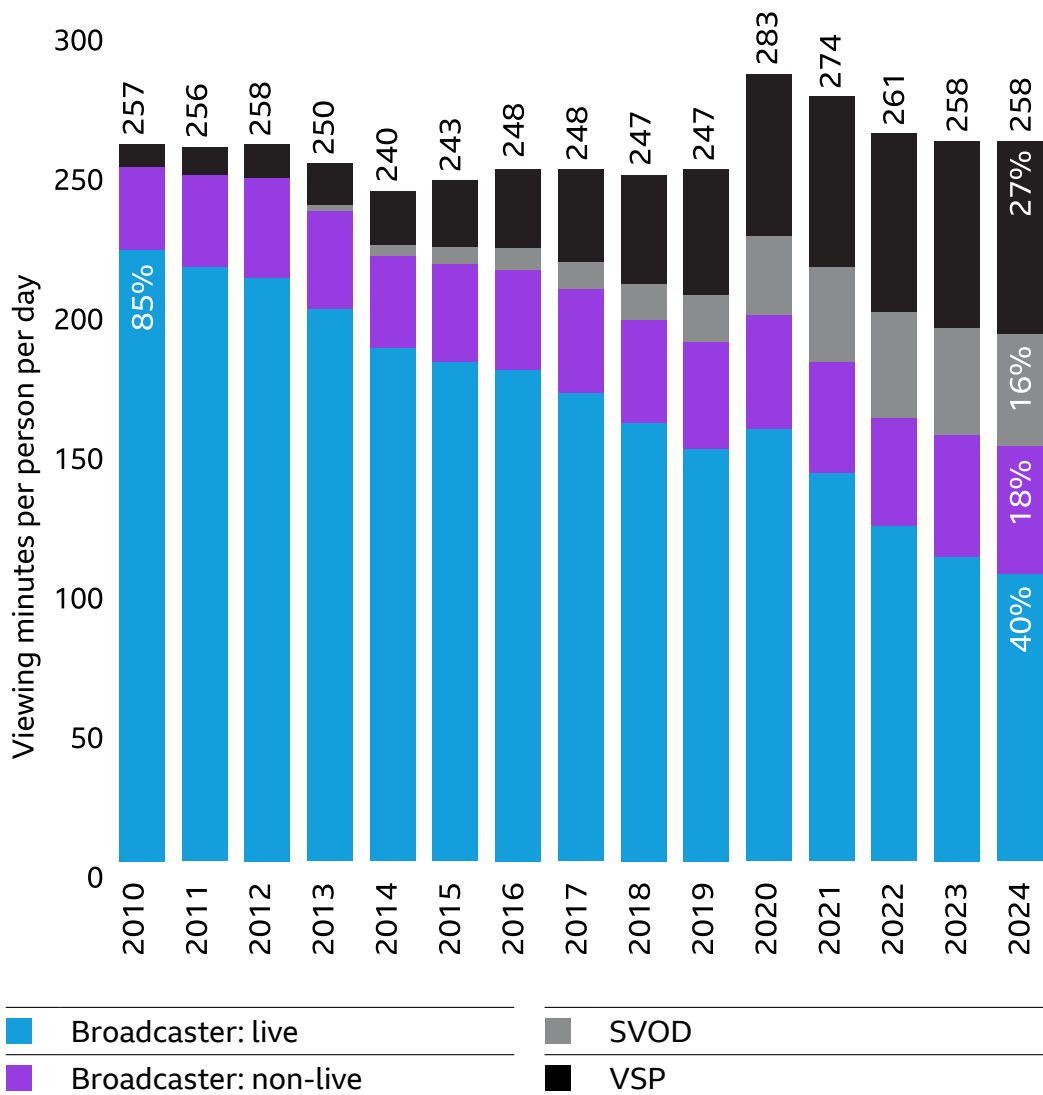
Premium genres such as drama have been particularly affected, with an average increase of 10.5% a year between 2019 and 2026. Some of these inflationary pressures reflect extraordinary events such as the impact of Covid-19 or the US writers' strike, all compounded by several years of high inflation in the wider economy. The UK went through a period of very high inflation from 2021 to 2023, with Consumer Price Index (CPI) inflation peaking at 11.1% in 2022. Many production cost inputs, including salaries, transport, food and energy costs increased meaning the BBC faced an average TV cost inflation rate of 7.3% a year between 2019/20 and 2025/26 across all genres and dayparts. While some parts of the market have seen cost pressures subside, we expect above-CPI inflation rises to continue for the most expensive content and for BBC content costs overall, and explain the consequences of these cost pressures, alongside income trends, in the sections that follow.

For some of this period, we were able to mitigate part of the impact of production inflation through growing third-party investment, protecting the value of our content for audiences. When the BBC commissions a programme, we purchase rights to show the programme on our services in the UK. The commission may also secure investment in return for ‘secondary rights’ (typically ex-UK). Such investment into the production means BBC audiences can enjoy higher production values than their licence fee could otherwise afford. Between 2016/17 and 2021/22, third-party investment in our commissioned content grew by 83%. But, since 2022/23, third-party investment into our commissions has fallen each year, as growth in Subscription-Video-on-Demand (SVOD) subscriber volumes (and thus commissions) began to slow, and global streaming providers increasingly seek global first window rights. We expect this trend to continue and potentially accelerate due to further consolidation among the streamers and greater market saturation.



**The number of hours of video content which cost us more than £1 million per hour rose six-fold between 2016/17 and 2021/22.**

**Figure 3: The amount of video viewing by type of viewing over time**



Credit: BBC analysis of Enders Analysis data, 2024



The BBC’s real-terms licence fee income has fallen by 24% since the start of this Charter.

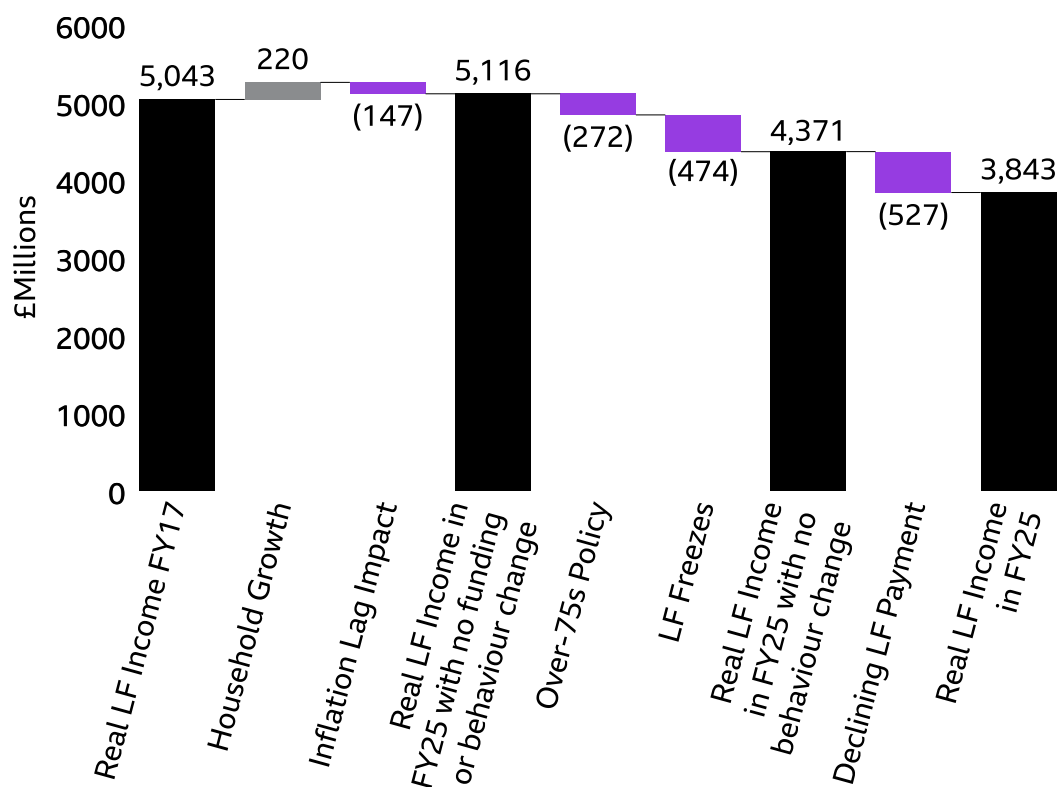
### Our income

The BBC’s income is drawn primarily from the licence fee, which provides over 85% of funding for our public services. Against the backdrop outlined above, the BBC’s real-terms licence fee income has fallen by 24% since the start of this Charter.

This drop equates to the BBC having around £1.2 billion less in real terms from licence fee income in 2024/25 than in 2016/17. There are three primary reasons for this decline:

- Fewer households holding a TV licence, mainly due to a reduction in the number of households that fall within the licence fee rules
- The previous government’s decision in 2015 to transfer the cost of funding free TV licences for over 75s onto the licence fee payer instead of the taxpayer
- The previous government’s decision in 2022 to freeze the price of the licence fee for two years at a time of high inflation in the UK economy

**Figure 4: Licence fee (LF) income has fallen by 24% in real terms since 2016/17**



Note: “Inflation lag impact” reflects that licence fee (LF) price changes are calculated based on past inflation rates, not the current level of inflation. As such, during periods of rising inflation, the price of the TV licence will fall in real terms, and conversely in times of falling inflation, the price of the TV licence will rise in real terms.

Credit: BBC Data

These three drivers of decline, alongside cost inflation, have compounding effects. Less money means there is less to watch on BBC services, which – despite the TV licence being required to watch any linear service, whether BBC or not – makes some households less likely to buy or renew a TV licence.

## Looking forward

As we look forward to the next Charter, the broad trends of the past decade will not reverse, and some could deepen. We forecast that the inflationary pressures on premium content will ease somewhat, but remain higher than CPI inflation, that audience behaviours will continue to diversify and fragment and that licence fee income will continue to decline.

We are already taking decisive action. In addition to the £1.5 billion total savings already delivered over the Charter, we recently set a new target of driving a further 10% from our total Public Service cost base by the end of 2028/29. Together with the additional savings already planned, this will require a further £500 million savings over two years. This is necessary to restore short-term stability. It will inevitably mean changes, and we are looking at all options.

Over the longer term it will not be possible to sustain a BBC of its current scale, let alone incorporating any of the additional or extended duties proposed across the Green Paper. The jeopardy here is clear: the gaps we will leave will be filled by louder, narrower and more polarised alternatives, resulting in a media landscape – and a society – where the divisions taking hold harden and deepen.



**Over the longer term it will not be possible to sustain a BBC of its current scale.**



The current cast of 'The Archers' re-record the first ever scene to celebrate the show's 75th anniversary

*Credit: BBC*



By the end of the Charter, we will have delivered around £2 billion in total savings including a net reduction of 2,000 FTE headcount.

# Transforming our operations

Before any consideration of how the BBC's funding model should be changed, we must consider how efficient we are, and where there is scope to do more for less.

## Our track record

Our starting point is to make sure we are squeezing as much value as we can out of every pound of income we receive. We have a strong track record. In this Charter period, we have delivered a programme of transformation, reshaping how we serve audiences and how we operate. By the end of the Charter, we will have delivered over £2 billion in annual savings in BBC Public Service (BBCPS). We have already delivered a net reduction of 2,000 Public Service FTE headcount by 2024/25. Further details can be found in a separate report we are publishing alongside this response.



Read the BBC E&T Report here: <https://www.bbc.co.uk/aboutthebbc/documents/bbc-efficiency-and-transformation-review>

Of the £700 million savings plan, £470 million will be reinvested to grow our offering in premium video hours, strengthen our digital products and maintain our position as the most trusted and most used source of media in the UK. 95% of our controllable budget is now spent directly on content and services. An independent report by EY-Parthenon found BBC Public Service remains in the top quartile of comparable organisations for both its overhead and indirect cost rates, consistent with the findings from 2018 and 2020 reviews.<sup>96</sup>

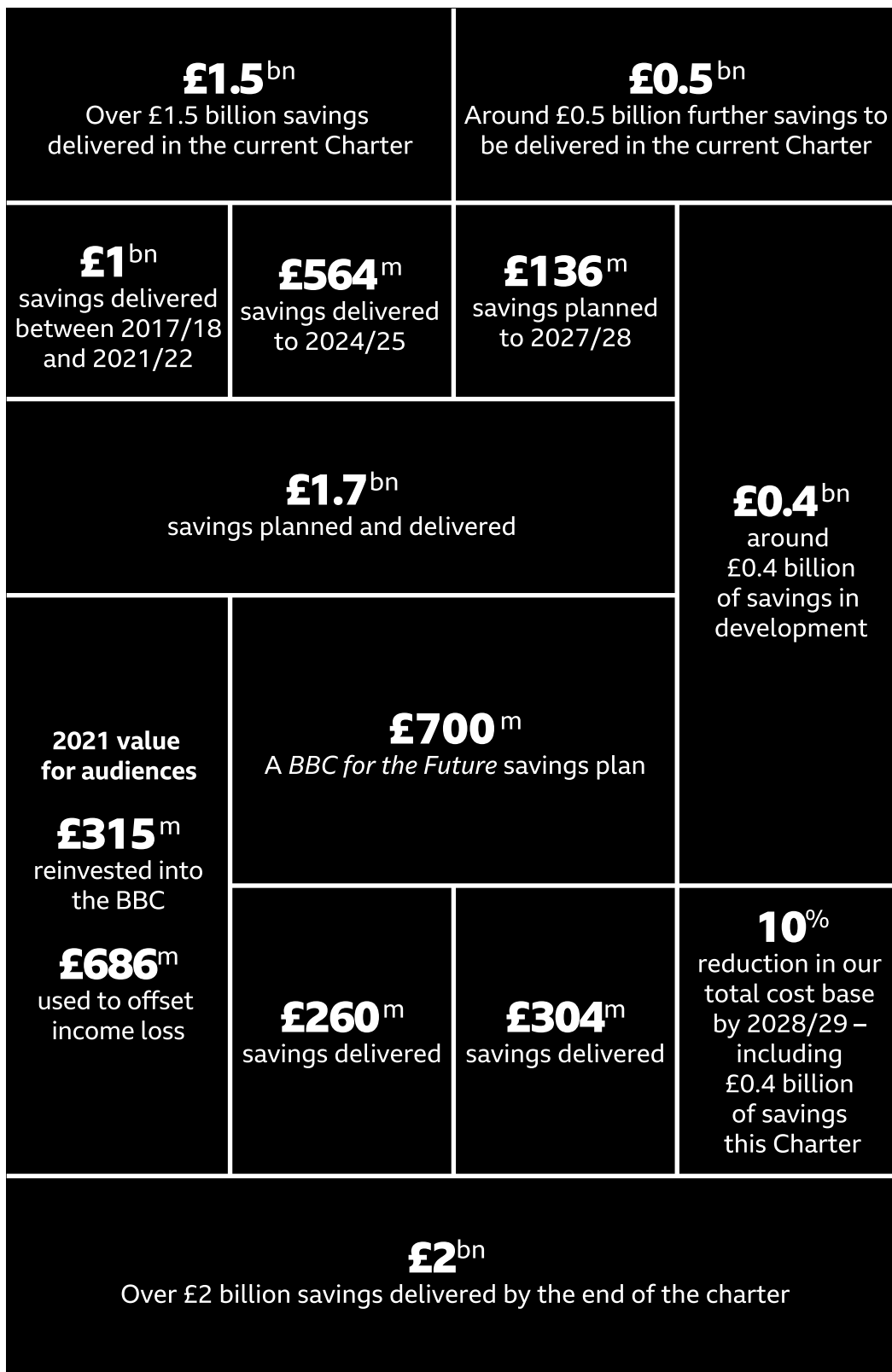
Further details can be found in a separate report we are publishing alongside this response.



Read the EY P Report here: <https://www.bbc.co.uk/aboutthebbc/documents/ey-efficiency-and-transformation-review-assessment>

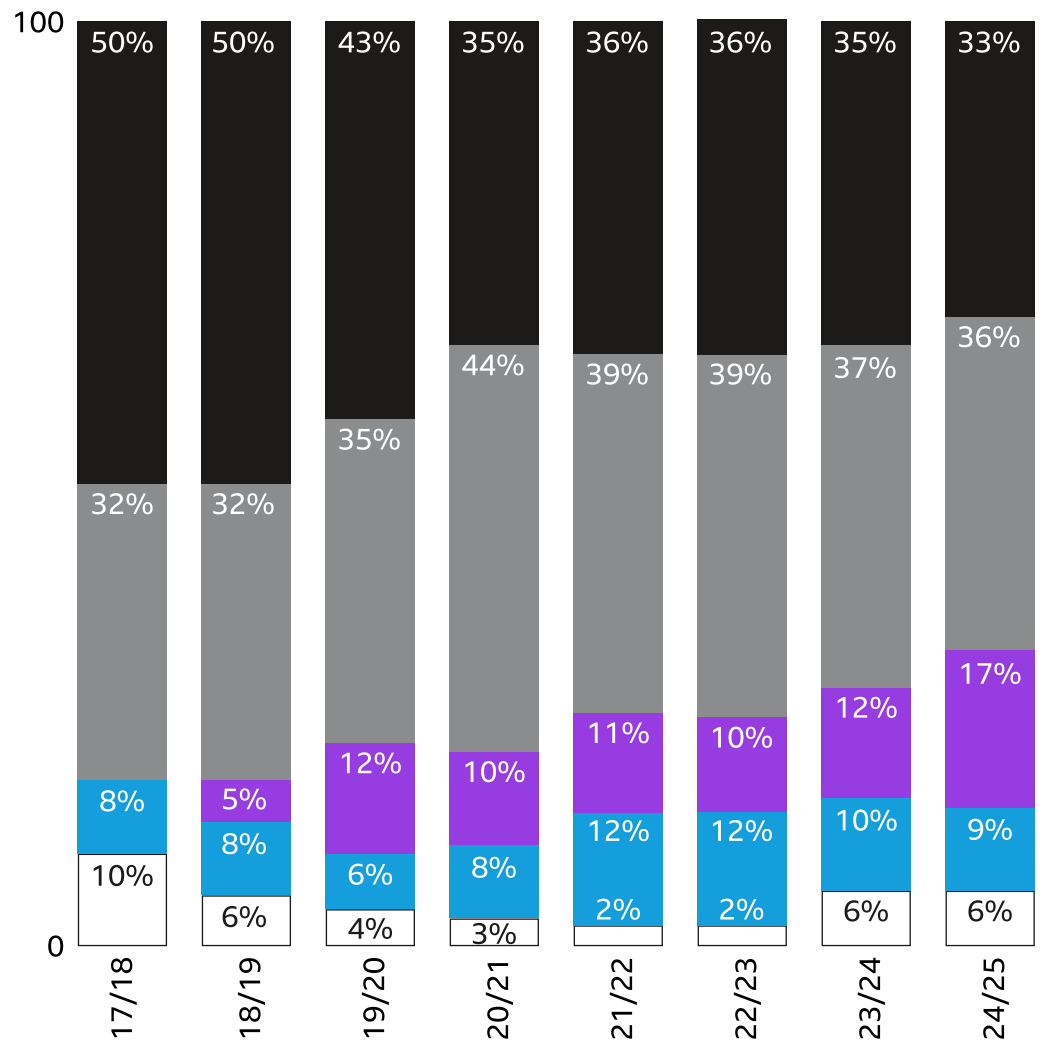
We recognise the challenge ahead. Savings made from genuine productivity have fallen from half of total cumulative annual savings in 2017/18 to a third of total cumulative annual savings in 2024/25. We have had to make significant cuts to the shape of our services, for instance decommissioning several popular long-running drama and entertainment formats. As the National Audit Office (NAO) noted in 2021 *'the BBC's decision to make savings from productivity improvements first means that it now needs to deliver most of its savings from its more audience facing operations.'*<sup>97</sup>

**Figure 5: By the end of the Charter, we will have delivered over £2 billion of annual BBCPS savings to support strategic reinvestment and to offset lost income**



Credit: BBC Data

**Figure 6: The profile of cumulative efficiency savings over time**



**How we generate savings**

Savings are delivered through a range of measures defined as follows:

- **Productivity** – Changes to improve how we procure goods and services, use technology and organisational restructuring.
- **Scope** – Choosing to cancel or reduce the volume, or quality, of content and services for audiences.
- **Scheduling Mix** – Changing the mix or quality of content for audiences, while avoiding impacts on performance.
- **Commercial income** – Investment from third-parties into BBC commissioned programmes, or sale of spare capacity.
- **Pensions**

*Credit: BBC Data*

## Our plans

Our track record gives us a strong base to work from, but efficiency is a journey not a destination. We know we can, and must, deliver more savings and have already set out new and stretching internal targets. The additional 10% we need to remove from our Public Service cost base by 2028/29 is, as yet, unplanned. To achieve this, a relentless focus on productivity alone will not be enough, so we are looking at more radical plans, like structural changes, new ways of working and deeper adoption of technology. There are no easy answers and delivering such radical strategic transformation will mean making some difficult choices that impact what audiences see and hear.

Our thinking in this area continues to evolve. Some initial examples of radical transformations include restructuring business operations across the BBC Group and developing a new media technology platform. We are also using AI to drive efficiency in existing workflows and content creation, guided by BBC AI principles.<sup>98</sup> Around half our staff are already using AI tools each week for a wide range of activities. For example, using AI to help draft marketing materials, using agents to make it quicker for staff to answer internal queries and using coding assistants to help software engineers write, modify and debug code. We are also using AI to analyse data, automate common workflows and create tags for content. Our next step is to transform whole workflows using AI, delivering greater efficiency and a better employee experience.

As we accelerate these plans, we will work with government over the coming months to assess an appropriate target for future efficiencies, taking account of appropriate benchmarks and developments, including any appropriate AI productivity opportunities.

There are some issues beyond the scope of Charter Review that may limit our efficiency and require attention. The BBC needs to be universally available in ways that provide good value for money for the licence fee payer. Arqiva is the monopoly supplier of broadcast infrastructure in the UK for Digital Terrestrial Television (DTT), Digital Audio Broadcasting (DAB) and AM/FM radio, so the BBC and other PSBs and radio broadcasters depend on effective regulation to ensure fair pricing. As audiences move away from broadcast services, these assets need managing without excessive charges being passed on to customers. Without regulatory reform, there is a risk that the costs of maintaining these services will increasingly fall on the licence fee payer.



**We know we can, and must, deliver more savings and have already set out new and stretching internal targets.**



The profits generated from commercial operations are used to supplement public service budgets and reduce the burden on the UK licence fee payer.

# Increasing our commercial ambitions

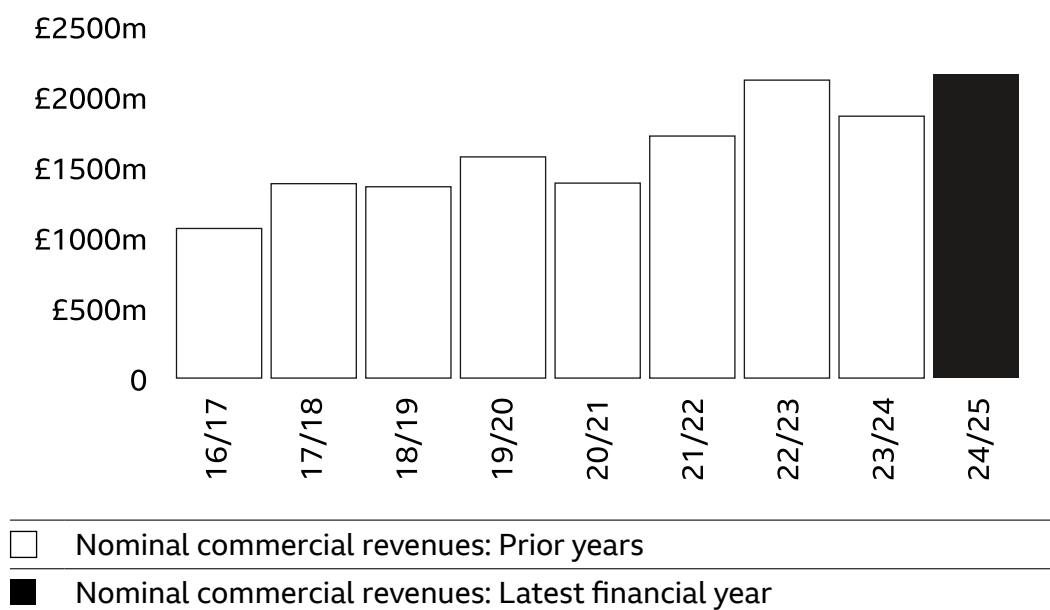
Commercial growth is an essential component of sustainable funding. The BBC has been operating a hybrid funding model since the 1960s. While public funding has always made up the majority of our funding, the BBC Group has substantial commercial operations under BBC Commercial. For the most part, commercial revenue is generated by ancillary commercial activities (i.e. activities that fit with the BBC’s mission and public purposes, but whose primary purpose is to generate a profit).

The profits generated from commercial operations are used to supplement public service budgets and reduce the burden on the UK licence fee payer. We welcome the government’s focus on whether there is scope for the BBC to expand its commercial activity, including through radical approaches.

## Ancillary commercial activities

Over this Charter period BBC Commercial has doubled its annual revenues, reaching £2.15 billion in 2024/25 and returning substantial annual dividends to fund public service content (averaging £125 million a year over the last four years). BBC Commercial has delivered consistent growth over the current Charter period, outperforming market growth.

**Figure 7: BBC Commercial revenues in this Charter period**



Credit: BBC Data



### 'Bluey'

*Credit: Ludo Studio 2018*

This growth has been achieved during a period of generally strong underlying market conditions and with the help of government more than doubling BBC Commercial's borrowing capacity in 2021, which enabled the full purchase of BritBox International.

However, continued growth will be difficult given an increasingly challenging set of market conditions and restrictions placed around the BBC's commercial activities including:

- Government-imposed restrictions on the amount BBC Commercial can borrow, which limits access to capital below that of market norms, and therefore reduces BBC Commercial's ability to invest for future growth
- Regulatory restrictions which inhibit strategic cooperation and coordination between the BBC's commercial and public service arms
- Declining funding for the BBC's public services due to declining licence fee income, which has a curbing effect on the potential for new IP creation from BBC's public services that can be leveraged by BBC Commercial

For BBC Commercial to keep growing its business – and the returns it delivers – it needs the ability to operate on a more level playing field with scaled global players.

We therefore urge the government to allow the BBC greater access to capital and will work closely with HM Treasury, UKGI and the ONS on how this might be enabled and to unlock further growth in the UK creative industries. There are a range of options here, including decisions government could make before the conclusion of this Charter Review that would allow BBC Commercial to keep delivering growth.

We support the government's commitment to explore regulatory changes to enable greater strategic alignment and collaboration between the BBC's public service and commercial arms. This is vital for the BBC to operate as a group with an aligned strategy, and to maximise commercial returns to support the BBC's public mission and reduce the burden on licence fee payers.



**We support the government's commitment to explore regulatory changes to enable greater strategic alignment and collaboration between the BBC's public service and commercial arms.**



**For BBC Commercial to keep growing its business – and the returns it delivers – it needs the ability to operate on a more level playing field with scaled global players.**



### **Making ‘Civilisations: Rise and Fall’**

*Credit: BBC/BBC Studios/Ikram Ahmed*

The regulatory framework still needs to fulfil some essential requirements, such as ensuring licence fee income is directed towards the BBC’s public mission, that there is no unfair cross-subsidy of the BBC’s commercial activities by public funds, and that commissioning remains fair, reasonable, non-discriminatory and transparent. However, Ofcom’s current trading and separation rules go far beyond this and unduly restrict the BBC’s ability to operate as a group with an aligned strategy. This includes rules mandating components of the BBC’s governance structure that interfere with the BBC Board’s duties under the Charter to oversee commercial strategy and others that impact on our ability to benefit from legitimate efficiencies and economies of scope and scale.

The Green Paper also puts forward several strategic options the BBC itself could pursue to increase commercial returns from ancillary commercial activities. We agree that ambitious partnerships – particularly with other public service media organisations – are important in a global and consolidated market where scale is crucial. For many years collaboration between the UK’s PSBs was seen as anti-competitive – see for example the decision of the Competition Commission in 2009 to block a streaming partnership between the BBC, Channel 4 and ITV. As outlined in earlier Chapters, there are some opportunities for mutually beneficial partnerships that could drive more commercial income as well as support PSBs that we will explore further in the coming months.

On AI licensing, we are exploring potential data licensing deals with AI developers, ensuring they work for the BBC commercially and editorially. We would highlight the importance of a UK regime that promotes the ability of the creative and news sectors to effectively license content and will seek to support its development, working with industry and government.

BBC Commercial has also successfully generated commercial revenue from distributing content on YouTube outside the UK. We plan to continue to explore opportunities for further monetisation with YouTube, using different business models.

With government action to reduce any unnecessary constraints on growth described above, we are optimistic BBC Commercial can continue to grow and support public services through the commercial dividend

## Commercialising public service activity

Our approach to any commercialisation of public service activity is simple: it must generate net revenue on a sustainable basis (when factoring in any loss of licence fee income due to a potential lower willingness to pay the licence fee); and it cannot erode universality, damage independence or impartiality or create an undue impact on the wider sector.

Under this Charter, the BBC has successfully commercialised parts of its traditional public service activities without compromising these core principles. For example, spinning out most of the BBC’s public service in-house production activities to BBC Commercial, and subsequent transfers of Children’s production in 2022 and some of radio production in 2024. These were not, however, changes to audience facing activities.

The Green Paper proposes some radical options to commercialise existing audience facing public service activities through advertising and/or subscription. Before we address those, it is important to set out our views on a fully commercial model for the BBC, given some external commentators have argued it is the best way to fund the BBC.

A subscription BBC would mean a very different BBC. It would not be universal, not provide something for everyone or cater to a full range of audience tastes and interests, or bring the nation together. It would be based on maximising value to some not to all. It would turn a public service into a consumer product, excluding many households, particularly older people<sup>99</sup> and people on lower incomes. It would incentivise commissioners to prioritise content that attracts subscribers and reduces subscriber churn, resulting in cutting services that are not commercially focused – which include education, most news products, local services and large parts of radio.

“

**A subscription BBC would mean a very different BBC. It would not be universal, not provide something for everyone or cater to a full range of audience tastes and interests, or bring the nation together.**



'Smoggie Queens'

*Credit: BBC/Hat Trick Productions*



**The Green Paper rightly acknowledges the ongoing economic pressures facing the broadcasting advertising market and notes an advertising model could draw revenue away from other broadcasters.**

The economics of a commercial subscription offer are also very challenging. Customers have come to expect a mainstream VOD service to offer lots of top quality content at a very low monthly price, which can only be delivered profitably if the service operates globally and owns the rights to their biggest titles, which must have global relevance and appeal. Combined with costs of customer acquisition and typically high churn rates, this means that media companies have had to invest billions of dollars and absorb several years of losses to get to break even. A wholly subscription-funded BBC in the UK would also not be able to achieve the same uptake or income as the licence fee, and so it would provide a much smaller offer to a much smaller audience.

A BBC funded by advertising would also be a different BBC. We note that while it would be novel for BBC-branded services, it is a funding model – either in full or combined with some public funding – used by public service broadcasters in the UK and across Europe.

There are, however, well founded and longstanding concerns about a full advertising model. The Green Paper rightly acknowledges the ongoing economic pressures facing the broadcasting advertising market and notes an advertising model could draw revenue away from other broadcasters, including other PSBs. This could place additional strain on an already important creative and economic sector. There are other concerns, including distinctiveness and brand reputation risks regarding perceptions of editorial independence.

Moving on to the ideas put forward in the Green Paper. First, models whereby advertising is limited to parts of BBC Online such as entertainment and sport pages or older/archive content.

For the *'parts of BBC Online'* option, we look forward to working through the detail of the proposals with DCMS. We think the potential market impact of display advertising across BBC Online and BBC apps would be concentrated on other UK publishers – including news providers – rather than the large advertising platforms of Google, Meta and Amazon, which could materially harm the income and sustainability of UK publishers. We do not think this would be a positive outcome, especially given the focus elsewhere in the Green Paper on the sustainability of UK journalism.

As for archive, it is important to note that, through the wholly-owned UKTV portfolio, BBC Commercial already operates an advertising-supported service in the UK, which is a key commercial route to market for BBC archive content. This is a successful line of business for BBC Commercial, though it could be more effective if UKTV was integrated into the BBC's iPlayer service (though still clearly distinguished from BBC-branded content and services). This would make it easier and more convenient for audiences to access UKTV content, with a higher revenue upside, and with brand separation as a way to mitigate the risk of audience confusion. We will explore this idea further with DCMS in the coming months.

Finally, the Green Paper also raises the idea of the BBC publishing licence fee funded content on third-party platforms such as YouTube, and monetising the viewing through adverts (in addition to the commercial activity already conducted by BBC Commercial on the platform).

We recognise the strategic imperative to reach audiences on popular third-party platforms as well as our own, and we recently announced a partnership with YouTube which is covered in previous Chapters. While we see this as a significant opportunity to serve audiences and deliver public value, we do not envisage a major commercial upside due to the limited revenues on offer from video sharing platforms. Even if we were to distribute a greater proportion of our catalogue as the Green Paper suggests (which would require careful balancing with our distribution strategy and negotiation/payment for additional rights), YouTube economics are challenging for broadcasters to make a positive return on premium content – advertising pricing is significantly lower than linear and Broadcaster-Video-On-Demand (BVOD), fewer adverts are served, and the platform takes a large share of the revenue. This means that broadcasters can expect to earn much less for every hour of content viewed on a Video Sharing Platform than they would on their own VOD service.

“

**We recognise the strategic imperative to reach audiences on popular third-party platforms as well as our own... we do not envisage a major commercial upside due to the limited revenues on offer from video sharing platforms.**



**'Man Like Mobeen'**

*Credit: BBC/Tiger Aspect/Paul Husband*



**Our starting point is that putting public service content behind a paywall is inconsistent with our public mission of a universal BBC providing value for all.**

The second area considered in the Green Paper is a two-tier or top-up subscription model. Our starting point is that putting public service content behind a paywall is inconsistent with our public mission of a universal BBC providing value for all. We have considered a broad range of two-tier subscription options, and each option removes some of the value that households get from their TV licence, which means licence fee payers and income will decline. The basic economics of these models therefore require that the additional commercial revenue at least equals the lost licence fee revenue.

The Green Paper presents two hybrid options. The first option would place the BBC's 'commercially viable' genres – such as drama, comedy and entertainment – behind a subscription tier. This would deny non-subscribing households, including those that cannot afford to subscribe, access to content that is central to the BBC's public purposes.

These genres are also key drivers of audience reach across BBC channels and iPlayer. Removing them from the universal offer would sharply reduce reach and engagement with remaining public service content, such as news and factual programming, significantly weakening the BBC's public value. That would also likely trigger a substantial fall in licence fee income, as the residual 'market failure' genres are unlikely to sustain broad willingness to pay. This type of model therefore risks cannibalising more licence fee income than it generates in subscription, creating a downward funding spiral. On this basis, we do not consider this model viable for the BBC.

The Green Paper's second option would shorten the free availability window on iPlayer, with access beyond that point restricted to paying subscribers. While this approach has a smaller impact on the BBC's public service mission than the first option, we are currently unconvinced it offers a credible path forward. Extended window content is disproportionately valued by lighter users, meaning there is a significant risk that commercial gains would be outweighed by increased licence fee churn. This would not only mean the BBC would have less income, but it would be less universal in its reach – delivering less public value overall. We note also that this is an unorthodox tiering approach – we are not aware of any other mainstream broadcaster or streamer that has adopted a pricing model where customers have to pay extra for extended content availability.

In conclusion, we are willing to consider radical options for future funding. Any sustainable model will require the BBC's commercial operations to play a greater role. The key questions are the extent to which government is prepared to support the growth of our existing commercial activities, and the extent to which it considers it appropriate, and economically viable, to commercialise existing audience facing public service activities.

While variants of the models to commercialise audience facing public service activity set out in the Green Paper might be able to provide some supplementary funding, they are unlikely to provide a meaningful substitute for public funding and risk undermining it.



# A modernised public funding mechanism that is fair and future-proof

A modern public funding mechanism is essential to secure a universal BBC for the next generation. Reforms could create a system that is more sustainable, more transparent and fairer for audiences.

## Context

The majority of UK households still pay the licence fee which has, for many decades, allowed the BBC to invest in trusted news, the best homegrown storytelling, and bringing people together, connecting audiences through high-quality, unmissable shared content. In 2024/25 there were 23.8 million licences in force, raising around £3.84 billion revenue.

But audience behaviours have changed and the framework has not kept pace. There is a growing gap between what types of activity and content are deemed as licensable by the rules, set by government and approved by Parliament, and the ways in which content is consumed. The result is a universal service that is not funded universally. The Green Paper also raises some concerns with aspects of the licence fee, including its affordability, impact on cost of living and how it is enforced. We hear these concerns. Given the degree of change, it is now appropriate to consider how public funding can now be modernised to make it suitable for today's media environment.

That is why our starting point on public funding is clear: the current model is not sustainable and needs reform. Failing to act would not be in the interests of the public, our audiences, economic growth or the creative and information sectors we operate in.

As we set out in *'A BBC for the Future'* in 2024,<sup>100</sup> we have been looking at reforms to scope, fairness and enforcement and there are some specifics in the Green Paper where we think it is helpful to put forward some of our initial thinking. We are confident that this process of open and meaningful consultation and public engagement on this matter, and the trade-offs between different answers, can yield a solution that matches the government's ambition for a future BBC.

“

A modern public funding mechanism is essential to secure a universal BBC for the next generation.



**A price cut to support cost of living and affordability is not sustainable under the status quo, however in combination with other changes to protect universal funding it could be a bold move to support the BBC’s long-term sustainability.**

**Price**

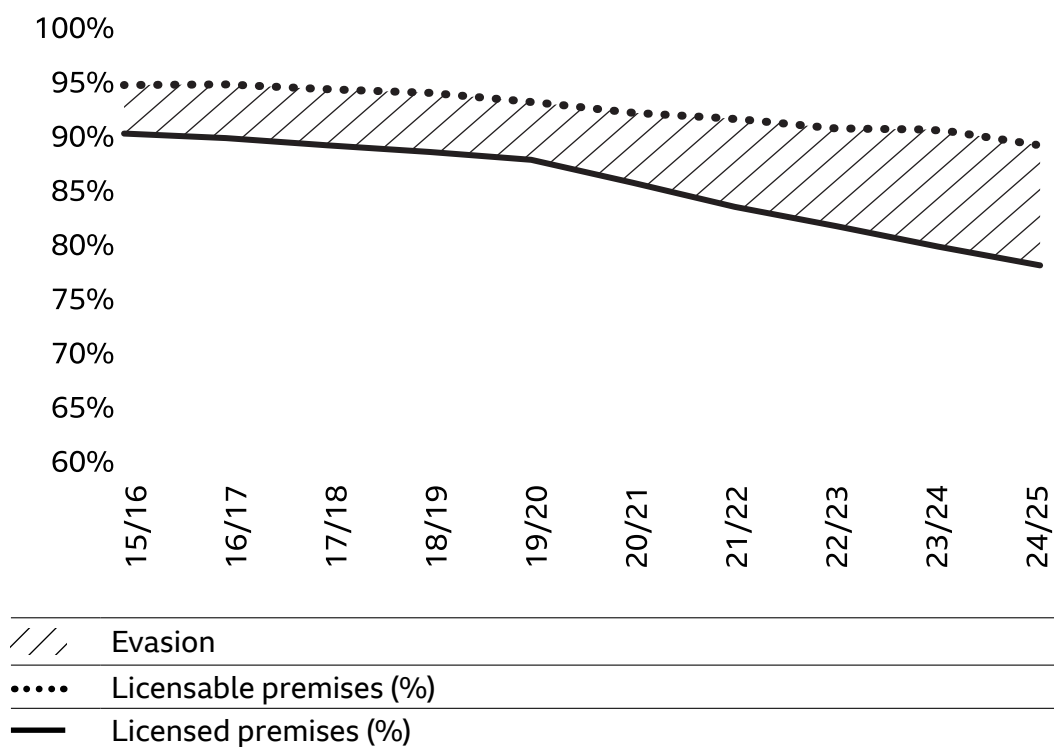
We recognise the pressures facing households and wider concerns about the cost of living.

The Green Paper asks for views on whether the scope of the licence fee should be reformed to support the BBC’s sustainability, which could involve requiring more households to pay but each paying less.

We welcome this kind of radical thinking. The licence fee has been frozen for periods, but no government has ever taken the decision to reduce the price. A price cut to support cost of living and affordability is not sustainable under the status quo, however in combination with other changes to protect universal funding it could be a bold move to support the BBC’s long-term sustainability.

Obviously, the level at which the fee can be reduced depends on a number of factors drawn out in our response. What kind of BBC does the UK want? How much can be saved via efficiency and/or generated by commercial? How many more paying households might a scope reform achieve? We welcome further discussions about the ways this might be achieved alongside sustainable funding.

**Figure 8: Licence fee trends**



*Credit: BBC Estimates*

## Scope

Households that watch or record live TV – on the BBC or elsewhere – or use BBC iPlayer to watch BBC content are required to hold a licence. As covered in this Chapter, the number of people consuming live TV has fallen, as has the volume of live TV consumed.

This is because audience behaviour has changed at a pace and scale not anticipated in the last Charter Review. As outlined in the Figure below, the number of households requiring a licence has fallen from around 96% in 2016/17 to 90% in 2024/25, while evasion has increased from around 5.3% to 12.5%. The total number of licences in force has fallen from 26.3 million to 23.8 million. The primary driver for these changes is the rise in SVOD services and video sharing platforms, and the corresponding decline in live TV consumption.

At the same time, the BBC is used by 94% of UK adults per month,<sup>101</sup> creating a disconnect between payment and value. A public service that almost every household uses but millions of households now do not pay for may, over time, increasingly lose the confidence and support of licence fee payers.

In our view the factors underlying these trends are permanent and irreversible and will deepen over the coming years.

The precise set of rules that require households to be licensed no longer reflect typical audience behaviour among many households in the UK. The TV licence is predicated upon content being consumed via ‘live TV’ (i.e. watched as it is being broadcast).<sup>102</sup> But on-demand consumption is not licensable, unless it is BBC content consumed via iPlayer.<sup>103</sup>



**The precise set of rules that require households to be licensed no longer reflect typical audience behaviour among many households in the UK.**



‘Funboys’

*Credit: BBC/Mayhay Studios Ltd/Jeremy Stockton*



**Our starting point on public funding is clear: the current model is not sustainable and needs reform.**

There are more complications and inconsistencies with the current rules, such as:

- Watching a drama or sports events at the time it is broadcast or on a plus 1 channel (on any channel or streaming service) is licensable, but watching it on-demand is not – unless it was recorded on a Personal Video Recorder (PVR) or on iPlayer
- A TV licence is required to watch any live video content on streaming services or Video Sharing Platforms (VSPs). While this is an increasingly common behaviour (and these platforms have made the strategic choice to include content that is live), it is not widely understood by their audiences, and there is little or no effort made by the services in question to inform them
- As we make the strategic choice to ensure BBC content is available to audiences wherever they are – including on third party platforms – we will inevitably increase the amount of content distributed beyond our own services. As this grows, audiences may become less clear about which content is covered by the licence fee and which is not, increasing the potential for confusion

There are a range of options and considerations here to explore. Because these issues are global in nature, and not only applicable to the UK, it is instructive to look at how other countries have dealt with the same set of issues.

The general approach others have taken has been to restore universality of payment while taking steps to enhance fairness through progressive pricing or concessions to help those on lower incomes. Germany and Austria, for example, changed their licence fees into universal household charges while in Finland they introduced a charge linked directly to an individual's personal income. Other countries have decided to fund their public broadcasters from their state budgets via general taxation, some including safeguards against political interference.

Any proposal will need to address the practicalities of how to collect and enforce effectively, as well as how to avoid creating disincentives for sharing content with third party platforms to maximise audience impact and value. We expect more ideas to emerge through this consultation process. We are keeping an open mind on what the answer should be and look forward to continued engagement.



**'Banjo and Ro'**

*Credit: Shelley Richmond/Hello Halo/BBC Scotland*

## Concessions

The Green Paper also considers whether current concessions could be improved and whether there is potential for further targeted interventions. We are sensitive to the cost-of-living pressures households are experiencing and we are open to operating more concessions to help with affordability.

Parliament designed the licence fee so most households pay the same amount regardless of their household income. This means the licence fee takes up a higher proportion of a lower income household's income than that of a higher income household.<sup>104</sup> Over recent years, lower income households are likely to have felt the cost of the licence fee more acutely as they manage rising costs across the board while income growth has stalled.

To help alleviate the burden on some households, the BBC operates three concessions which are funded from licence fee income. These are:

- Free licences for households with anyone aged over 75 and in receipt of Pension Credit
- Half-priced licences for households with anyone who is severely sight impaired or blind
- An annual fee of £7.50 for people living in some types of care

Alongside these concessions, the government introduced a new more flexible payment scheme called the Simple Payment Plan (SPP) for households in financial hardship in 2020, extending eligibility in 2025. This payment scheme is managed and operated by TV Licensing (TVL), and as of January 2026, more than 300,000 households are using the SPP.

Over the years there have been a range of ideas put forward about whether the fee could be reduced for some groups of people, and/or increased for others. Examples include those on Universal Credit, those aged under 75 on Pension Credit, students or younger people and those on some disability benefits.

On a practical level, delivering new concessions may require extending data sharing arrangements with the Department for Work and Pensions (DWP). There would also need to be an assessment of the wider impacts – including on households who do not qualify for any new concession and may therefore face higher costs – and on the BBC's ability to deliver its mission and public purposes.



**To help alleviate the burden on some households, the BBC operates three concessions which are funded from licence fee income.**



**TVL's role is to collect revenue in a way that is efficient, appropriate, and proportionate.**



**We welcome the government's recognition that TVL needs the right tools to carry out collection and enforcement duties effectively.**

## Collection and enforcement

The BBC, via TVL, has a statutory duty to collect the licence fee. This means Parliament requires the BBC to enforce the requirement to hold a TV licence, and TVL's role is to collect revenue in a way that is efficient, appropriate and proportionate. TVL contracts with some third parties who operate on behalf and under the supervision of the BBC. The biggest contractor is Capita, mainly based in Darwen and whose contract we recently extended until 2030 to allow for a smooth transition to any changes to the funding model.

TVL faces two challenges in delivering its duty. First, to protect revenue so that the BBC's public services are funded appropriately and, second, to ensure the system is fair to those who face prosecution.

On the first challenge, we welcome the government's recognition that TVL needs the right tools to carry out collection and enforcement duties effectively. This question is ever more pressing given the audience shifts outlined throughout this response.

The changing nature of TV consumption has made enforcement significantly harder, mainly because there is now a reasonable explanation why someone has a TV and is watching TV but does not require a licence because of the content they watch. This is the main factor why the numbers of prosecutions have fallen by around 80% since 2019.<sup>105</sup> It is also the key factor in evasion more than doubling in the past five years. As the Public Accounts Committee stated recently, evasion is unfair to the vast majority of households who do pay for a licence.<sup>106</sup>

We are considering the questions the Green Paper poses for using technology. Though options are limited for broadcast TV, we think it is worth exploring whether there are appropriate solutions for IP-delivered services.

This could focus on the interaction between TVL and services that provide licensable content – including BBC iPlayer as well as third parties such as the broadcasters' VOD services and other major streaming services. Options could include data-matching, pop up warnings around the need for a licence (as seen on iPlayer) right through to harder verification tools to block licensable content to non-licence holders.

We note that by itself iPlayer verification would only have a very marginal impact on enforcement. While around 80% of evading households use iPlayer, fewer than 5% of them only use iPlayer.<sup>107</sup> In 2025/26 to date only 1.8% of all households watched iPlayer but not any broadcast channels on their TVs.<sup>108</sup>

On the second challenge of prosecution, the legislation means that anyone found to have been watching live TV or BBC iPlayer without a TV licence is committing an offence and may be prosecuted. However, TVL uses its powers carefully, responsibly and sparingly and prosecution is very much a last resort. The average fine imposed by the Courts was around £200 in 2024. The offence does not carry the possibility of a prison sentence – while someone can be imprisoned for non-payment of the fine, this is true of any fine and is part of the general law relating to compliance with court punishments.

There is a different system in Scotland, where TVL gathers evidence and makes a report to the Procurator Fiscal, who decides whether to bring a prosecution. Most Scottish cases are settled out of court with a 'fiscal fine'. There are also different legal systems in the Channel Islands and Isle of Man.

In areas where TVL is the prosecuting authority, TVL has taken significant steps to mitigate the impacts of prosecution. TVL assesses all potential prosecutions against a prosecution policy that follows the principles in the Code used by the Crown Prosecution Service (CPS). This involves the Full Code Test, a two-stage test firstly of the evidence and then consideration of whether prosecution is in the public interest prior to any proceedings being initiated.

TVL actively encourages people to come forward with any mitigating circumstances throughout the process, though it can only act on the information provided. Following an independently overseen review of Gender Disparity in TV Licensing Prosecutions in 2023 we adopted a 10-point plan aimed at supporting those in financial hardship, to help people stay licensed and avoid prosecution. In 2024 TVL discontinued (before initiating a prosecution) an average of 106 cases each month on public interest grounds, a fourfold increase on the previous year.

That said, we recognise an ongoing concern about the impacts of enforcement, especially the gender disparity in prosecution levels. These issues have been considered multiple times in the past decade or so. The Green Paper notes that the review by David Perry KC found that the criminal enforcement system should be kept while the current licence fee collection system is in place. We agree. In line with this, reforms to collection and enforcement methods are best considered in the round alongside other reforms to understand fully the impacts and consequences. We look forward to discussing these options with government in the coming months.



**TVL has taken significant steps to mitigate the impacts of prosecution.**

# The World Service

As set out in Chapter 2, the World Service and BBC Monitoring need a long-term funding solution that guarantees sufficient funding to protect the UK's interests overseas. Under the new Charter, World Service and Monitoring funding should move back to government, as it was the case for the first 80 years of its existence. This should include appropriate safeguards to ensure funding is sufficiently secure and stable to allow for longer term planning. In tandem, we want to work with government on measures that would enable the BBC to adapt and evolve our international services, including our commercial offer.

→ Read more in Chapter 2



Divya Arya presents 'BBC Global Eye', a weekly programme from the World Service's critically acclaimed investigative unit, BBC Eye  
*Credit: BBC*

# Funding language content

As set out in Chapter 2 of our response, we have a long history of supporting the languages of the UK. We agree with the government’s assessment that *“the BBC plays a crucial role in supporting the various native languages across the British Isles.”*

Delivering such language content is essential to serving all audiences. In addition to the BBC’s own language services and content there are funding arrangements between the BBC and S4C and the BBC and MG ALBA, and some funding contributions are made by various national governments or agencies. BBC ALBA, for instance, is a partnership between the BBC and MG ALBA, with funding split between the BBC and MG ALBA, with the latter primarily funded by the Scottish Government. In 2024/25 the BBC’s contribution was £10 million out of a total budget of £22.5 million.

In 2022, the government decided that all S4C’s public funding, which had previously mostly been funded by central government, should come from the licence fee. This amounted to £97.6 million in 2025/26.

We agree with the government that *‘sustainable funding is crucial to ensuring that the BBC can continue its support of minority language speakers.’* We remain fully committed to continued provision of indigenous language content, but future funding will determine future scale and how far we can develop these services. We look forward to discussing this, and wider funding arrangements for language content, with government and partners in the coming months.

“

We remain fully committed to continued provision of indigenous language content, but future funding will determine future scale and how far we can develop these services.



‘An t-Eilean’

Credit: Black Camel Pictures/BBCAlba)

# Annex: Consultation Questions



# Annex:

## Consultation Questions

### Introduction: The BBC's Mission and Public Purposes

**Q:** 1. Do you agree or disagree that the BBC's current Mission and Public Purposes should remain the same?

**A:** The BBC's long-standing mission – to inform, educate and entertain – endures and continues to serve the UK's democratic, cultural and social needs. However, the public purposes could be updated to better reflect today's rapidly changing media environment, including the rise of misinformation, major technological shifts and increasing economic pressures. Updated public purposes could support our role in media literacy, in providing trusted news, and recognise the BBC's vital role in driving economic growth as part of the UK's creative industries.

**Q:** 2. To what extent do you agree or disagree that the BBC should have a specific Public Purpose to support economic growth?

**A:** Our investment, scale and long-term stability play a unique role in driving the UK's creative industries, stimulating regional clusters, supporting thousands of jobs and attracting inward investment. We agree that the BBC could have a specific public purpose to support economic growth.

**Q:** 3. Which option, if any, most closely represents your feelings on whether the BBC should continue to provide a wide range of content and services that represent all audiences in a way that brings communities together, supports social cohesion, and helps build a unifying national story throughout the next Charter period?

**A:** The BBC can and should do more to represent all audiences. In 'Our BBC, Our Future' BBC account holders sent us a clear message about the kind of organisation they want us to be in the future. While we already provide a broad range of content that reflects the UK and helps bring people together, it is clear that audiences want us to go further. While 76% felt it was important the BBC reflects people across the UK and different parts of the UK, 51% felt we were effective at it currently.<sup>109</sup> As we outline in more detail in Chapter 2, our plan is to deepen representation across genres, move more commissioning closer to audiences, innovate in formats, and strengthen how we tell a unifying national story for the whole UK.

**Q:** 4. If you agree that the BBC should continue or do more to play this role, what options aiming to improve how the BBC reflects and represents all audiences do you support, if any?

**A:** We want to listen to feedback on how we can better reflect and represent all audiences. Recent engagement through the Thematic Review on representation and portrayal has already helped shape our thinking and our plans for improvement. We know we can and should do more, and in Chapter 2 we outline a clear strategy to deepen portrayal, strengthen regional commissioning and work more closely with a wider range of communities and creators. At the same time, a universal BBC can only deliver truly universal representation if it is supported by a sustainable funding model that enables us to serve everyone.

### Chapter 1: A trusted institution

**Q:** 5. To what extent do you agree or disagree that new requirements on the BBC should be introduced so that the BBC does more to improve workplace standards?

**A:** As we make clear in Chapter 1, workplace culture is critical to trust and the Board should oversee standards and hold the Executive to account. The BBC must also retain its operational independence and sufficient flexibility to manage its workforce effectively.

**Q:** 6. How, if at all, does the amount those working for the BBC are paid impact your view of the BBC?

**A:** This is a question for audiences to answer. We publish detailed workforce, pay and expenses information every year, and we look forward to reading consultation responses on this issue.

**Q:** 7. To what extent do you agree or disagree that the BBC is currently accountable to the public?

**A:** The BBC must be accountable to the public. As set out in Chapter 1, we are held to account by external regulation, various forms of independent scrutiny and internal governance processes. Crucially, we are also directly accountable to audiences, including through the complaints process.

We want to go further, and to trial ways to deepen public participation and modernise transparency measures.

**Q:** 8. Which of the following options aiming to enhance the BBC's accountability, if any, do you support?

**A:** We support options that enhance accountability while preserving our ability to be flexible, test new approaches and learn what works best for the public. As set out in Chapter 1, the next Charter should focus on outcomes, avoid overly prescriptive requirements and incentivise us to pilot different models of public engagement and adapt as technology and audience expectations evolve.

**Q: 9. The government is considering targeted changes to increase transparency in the BBC to enhance BBC accountability over the next Charter period. Which options, if any, do you support?**

**A:** We support transparency measures that strengthen accountability while protecting our independence and operational agility. As we set out in Chapter 1, publishing more information is not always the answer; the challenge is to provide the right information in ways that are meaningful and accessible. We favour options that are principle-based and outcome-focused, which allow the BBC to innovate in how we communicate with the public.

**Q: 10. Why, if at all, does the BBC's independence matter to you?**

**A:** The BBC's independence is essential to our ability to deliver our mission and public purposes. As we set out in Chapter 1, the BBC must be – and be seen to be – free from undue government, political or commercial influence in all editorial, management and strategic decisions. Audiences agree, with 91% of the BBC account holders who responded to the 'Our BBC, Our Future' questionnaire<sup>110</sup> saying it is important that we remain independent from the government of the day. Independence helps to protect public trust in our journalism, supports democratic life, and ensures the BBC can serve everyone fairly, without fear or favour.

**Q: 11. What measures to increase the BBC's independence from government, if any, should be prioritised to support greater trust in, and engagement with, the BBC?**

**A:** In Chapter 1 we set out our views on how the BBC's independence could be strengthened. This includes removing the Charter's fixed expiry date; reforming the Board appointment process; and establishing a more transparent and independent process for determining our funding.

## **Chapter 2: Delivering services for the public good**

**Q: 12. What, if anything, should the BBC focus on to ensure AI is used for the public good, and for the benefit of the wider creative industries?**

**A:** We believe the BBC should use AI in ways that deliver clear public value and support the wider creative industries, but we do not support any Charter obligations that tie us to specific technologies. Any new Charter obligations related to technology should be principles-based – focusing on transparency, responsibility, safety and support for human creativity – while giving us the flexibility to innovate, adapt and test-and-learn as AI develops.

**Q:** 13. What kind of programming, if any, do you think the BBC should make more visible on its platforms?

**A:** We already make the full breadth of BBC content available across our platforms through thoughtful, audience-led editorial curation. Our role is to ensure that people can easily find a wide range of content that reflects the whole UK, and we continuously refine how we present and promote programmes based on evidence about what audiences value. We do not believe the Charter should prescribe visibility for specific genres or formats, as this is best determined through flexible, editorial judgement that can evolve with audience needs.

**Q:** 14. To what extent do you agree or disagree that the BBC should make greater use of third party platforms to share its content?

**A:** We agree that the BBC can make use of third party platforms to share its content.

**Q:** 15. Reflecting on your response above, please explain why you agree or disagree that the BBC should make greater use of third party platforms to share its content. Please provide relevant evidence, where possible.

**A:** In Chapter 2, we talk about how third party platforms can play an important role in helping us reach audiences, particularly younger audiences, and we have already taken significant steps through the new strategic partnership with YouTube and our wider off platform strategy. These moves allow us to deliver more public value where people are increasingly spending their time.

**Q:** 16. What, if anything, do you believe would improve the value and relevance of BBC news and current affairs to you? This includes all BBC news and current affairs content, including its TV, radio and online news services, and local, national and international news outputs.

**A:** Audiences trust us to provide independent, accurate and impartial journalism. Audiences turn to the BBC during major national and global events. Our reporting helps people understand the world around them, provides a shared foundation of facts, and strengthens democratic life by holding power to account. This role has never been more important in an era of misinformation, polarisation and rapid technological change.

To protect and enhance this value, the BBC must remain independent, sustainably funded, and able to respond quickly to changing audience needs. Independence is essential for maintaining trust and ensuring our decisions are free from political or commercial influence. Stable and modernised funding is needed so we can continue investing in high-quality journalism at local, national and global levels. And we need the flexibility to innovate – adapting how we gather news, how we verify information and how we reach audiences across platforms.

**Q: 17. Thinking about the next Charter period, what role, if any, do you think the BBC should have in ensuring UK citizens can recognise and access trusted and accurate information? Please provide any relevant evidence to support your response.**

**A:** The BBC has a significant role to ensure the public can recognise and access accurate, trusted information in a fast changing digital environment. We set out our view in detail in Chapter 2. This includes our commitment to strengthening verification, deploying new technology to identify deepfakes, and developing tools that improve the accuracy of how BBC journalism appears in AI assistants. We will expand our presence on platforms where misinformation spreads, ensuring trusted content reaches younger audiences, and scale media literacy support through Bitesize, classroom resources and initiatives that help people critically assess online information.

**Q: 18. The BBC’s international output showcases the UK, its culture and its values to a global audience. This includes the BBC World Service, which seeks to provide access to trusted news around the world in an increasingly challenging international environment. To what extent do you agree it is important that the BBC continues to perform these roles internationally?**

**A:** We strongly agree it is essential that the BBC continues its international role. The BBC is the most trusted international news provider globally, reaching 418 million people weekly for news in 2024/25 and it strengthens the UK’s influence, security and global reputation. The World Service provides trusted news in countries facing instability, disinformation and declining media freedom. In an increasingly challenging information environment, sustaining this global role is vital for projecting UK values and supporting democratic resilience worldwide.

### Chapter 3: Driving growth across the UK

**Q:** 19. What, if anything, do you value about the BBC being UK-wide?

**A:** The BBC delivers economic, cultural and democratic benefits across all nations and regions. Our investment acts as a catalyst for creative industry growth. BBC activity boosts jobs, skills and local production. Being UK wide also ensures audiences everywhere – not only in major cities – are represented, reflected and served.

**Q:** 20(1). To what extent do you agree or disagree that the BBC should be required to spread more of its spending, activities, and decision-making across nations and regions of the UK?

**A:** We strongly agree that the BBC should continue spreading more of its spending, activity and decision-making across the UK. In Chapter 3 we outline our ambitious plans to go further, but meeting them requires a Charter framework that provides sufficient and sustainable funding.

**Q:** 20(2). Which option(s), if any, would you support for spreading the BBC's economic impact and role supporting the production sector across the UK nations and regions?

**A:** We support options that allow the BBC to spread economic impact across the UK only where they provide flexibility rather than fixed or prescriptive targets in the Charter. The BBC already drives regional growth through investment in creative clusters, further progress depends on a Charter framework that support our three goals – independent, sustainable, responsive and avoids rigid quotas.

**Q:** 21. What, if anything, do you think the BBC could do to fill skills gaps in the creative sector? Please provide any relevant evidence, where possible.

**A:** As we say in Chapter 3, the BBC is a major, long-term investor in creative skills, committing at least £47m in 2025/26 through training, apprenticeships and industry schemes across the UK. Its programmes have supported thousands of staff, freelancers and emerging creatives, strengthened regional talent, and delivered successful commissions. With the right Charter settlement, the BBC plans to evolve its offer – expanding opportunities for young people, investing in regional skills hubs, prioritising future digital and AI skills, and working collaboratively across the sector to sustain creative careers.

**Q:** 22. If you represent an organisation that has worked with the BBC in the past, please share your reflections and provide evidence on your experience of how your partnership has worked and how it could be improved. You may wish to consider how you aligned vision and goals for the partnership, trust, communication, transparency, decision-making, or other aspects of partnership working.

**A:** N/A

**Q:** 23. If you are responding on behalf of an organisation with an interest in R&D (e.g. a production company, university, a technology hardware company), how would you like to see the BBC supporting innovation? Please provide relevant evidence, where possible. In your answer, you may wish to consider any specific areas where you think it should focus its leadership; what point of the R&D lifecycle is the BBC's support most valuable; and how would you like the BBC to partner with organisations like yours in R&D.

**A:** N/A

**Q:** 24. If you represent an organisation in the creative industries, please share your reflections on your experience of the current market impact regulation process and how it could be improved. Please provide relevant evidence, where possible.

**A:** We set out our view on market impact regulation in Chapter 3. There must be a robust approval process for changes to BBC services that may have a significant impact on fair and effective competition. The wider market has fundamentally changed over the last decade, so it is important the process reflects these changes, is effective and proportionate.

#### **Chapter 4: Sustainable and fair funding**

**Q:** 25. To what extent do you agree that the licence fee should continue to fund a wide range of services and output that aim to inform, educate and entertain audiences?

**A:** We strongly agree that the licence fee should continue to fund a wide range of services that inform, educate and entertain. The BBC is a universal service with something for everyone. From trusted news, children's content, education, local and global journalism, UK storytelling and support for the creative economy. A driver for personal value, as well as economic, cultural and social. A universal service requires a universal funding model. Without reform to our funding model, the BBC will no longer be able to maintain this breadth in the future or operate as UK owned asset, competing with global platforms.

**Q:** 26. To what extent do you agree that the BBC should use the funding it receives through the licence fee to deliver a broad range of benefits to the UK? This could include objectives such as investing in the nations and regions to drive growth across the UK, and developing skills that support the creative economy.

**A:** The BBC is central to the UK's growth, underpinning the creative industries through large-scale investment in British content, skills and regional production. In 2024/25 it contributed £6.5 billion to the economy, supported 77,000 jobs and generated £3.55 for every £1 invested.

**Q:** 27. To what extent do you agree that the scope of the licence fee should be reformed to support the BBC's long term sustainability, which could involve requiring more households to pay but with each paying less?

**A:** We agree that reforming the scope of the licence fee should be considered to support the BBC's long-term sustainability. Licence fee income has fallen sharply in real terms as fewer households pay despite continuing to access BBC content. A reformed model that requires more households to contribute at a lower cost could strengthen fairness and sustainability while preserving universal access to high-quality, trusted services.

**Q:** 28. To what extent do you agree or disagree that BBC content or services should carry advertising, bearing in mind how this could provide a new income stream for the BBC, how it might impact the audience experience and the impact on other broadcasters?

**A:** Our approach to any commercialisation of public service activity is simple: it must generate sustainable revenue (when factoring in any loss of licence fee income due to a potential lower willingness to pay the licence fee); and it cannot erode universality, damage independence or impartiality or create an undue impact on the wider sector.

**Q:** 29. Would you be willing to pay for a BBC top-up subscription service focused on premium and entertainment content, in addition to your licence fee, assuming it was a similar price to other popular video-on-demand subscription services?

**A:** Our starting point is that putting public service content behind a paywall is inconsistent with our public mission of a universal BBC providing value for all. Any commercialisation of public service activity is simple: it must generate sustainable revenue (when factoring in any loss of licence fee income due to a potential lower willingness to pay the licence fee); and it cannot erode universality, damage independence or impartiality or create an undue impact on the wider sector.

**Q:** 30. To what extent do you agree or disagree that new concessions for households facing significant financial pressures should be introduced?

**A:** To help alleviate the burden on some households, the BBC operates three concessions which are funded from licence fee income. The rationale for a new concession would include an assessment of the wider impacts – including on households who do not qualify for any new concession, and may therefore face higher costs – and on the BBC's ability to deliver its mission and public purposes.

**Q:** 31. To what extent do you agree or disagree that technology should be used to support compliance, for example by requiring households using BBC iPlayer to enter details from their TV licence?

**A:** Though options are limited for broadcast TV, we think it is worth exploring whether there are appropriate solutions for IP-delivered services.

This could focus on the interaction between TVL and services that provide licensable content – including BBC iPlayer as well as third parties such as the broadcasters VOD services and other major streaming services. Options could include data matching, pop up warnings around the need for a licence (as seen on iPlayer) right through to harder verification tools to block licensable content to non-licence holders.

As noted in Chapter 4, by itself, iPlayer verification would only have a very marginal impact on enforcement and therefore licence fee income.

**Q:** 32. Do you have any other views on the BBC's funding model that you wish to share?

**A:** The BBC's current funding model is unsustainable and requires reform. While almost all households use BBC services, many no longer contribute, creating an unfair and unstable system that undermines a universal public service. In a fragmented, globally dominated media landscape, universal funding is vital to protect independence, shared civic space and public trust. We are open to new funding models, provided they are fair, sustainable and futureproof, ensuring the BBC remains a service for everyone.

# Endnotes

1. <https://www.bbc.co.uk/ourbbcourfuture>
2. <https://www.bbc.co.uk/aboutthebbc/documents/bbc-annual-report-and-accounts-24-25.pdf>
3. <https://www.bbc.co.uk/aboutthebbc/documents/bbc-global-impact-and-influence-research-2025.pdf>
4. 91% of 872,701 respondents said it was important that the BBC was independent from the government of the day <https://www.bbc.co.uk/ourbbcourfuture>
5. BBC Royal Charter Articles 45-51 for Ofcom's regulatory oversight and Framework Agreement Articles 5, 6, 9-13, 15, 18-22, 25-28, 30, 56-60, 62 and Schedule 3 for regulatory remit
6. <https://www.ofcom.org.uk/tv-radio-and-on-demand/bbc/operating-framework>
7. <https://www.ofcom.org.uk/siteassets/resources/documents/tv-radio-and-on-demand/bbc/operating-licence/operating-licence-for-the-bbcs-uk-public-services-18-december-2025.pdf?v=409651>
8. Ofcom has published eight annual reports on the BBC's performance and compliance with its regulatory obligations since the commencement of the current Charter in 2017. Further information and Annual Reports can be found here: <https://www.ofcom.org.uk/tv-radio-and-on-demand/bbc>
9. <https://downloads.bbc.co.uk/aboutthebbc/insidethebbc/managementstructure/nao-bbc-mou.pdf>
10. BBC Royal Charter Articles 38-41 for NAO's regulatory oversight, and Framework Agreement Articles 54 and 55 for regulatory remit
11. For example, the future of TV licence concessions for over 75s; review of BBC's guidance on individual use of personal social media for those working in the on-air freelance community, outside News, Current Affairs and Factual Journalism
12. <https://www.bbc.co.uk/aboutthebbc/documents/bbc-unboxd-listening-to-younger-audiences.pdf>
13. <https://www.bbc.co.uk/ourbbcourfuture>
14. <https://www.ofcom.org.uk/siteassets/resources/documents/tv-radio-and-on-demand/bbc/bbc-annual-report/2024/a-mystery-shopping-exercise-of-the-bbc-first-complaints-process.pdf?v=386075>
15. <https://www.gov.uk/government/publications/bbc-mid-term-review-2024/bbc-mid-term-review-2024>
16. <https://www.bbc.co.uk/aboutthebbc/documents/egsc-review-december-2025.pdf>

17. *Published alongside the EGSC review was a more detailed review, commissioned by the Board, further examining the issues raised in a memo by an external editorial adviser. This includes reference to relevant action taken in World Service as well as commitment to further assurance work: <https://www.bbc.co.uk/aboutthebbc/documents/michael-prescott-memo-second-review.pdf>*
18. <https://www.bbc.co.uk/ourbbcourfuture>
19. *The Charter is fixed until Charter Review. Beneath the Charter sit the Framework Agreement and Ofcom’s Operating Licence for the BBC. Both of these can be amended during a Charter period, with changes to the Operating Licence requiring public consultation.*
20. <https://www.bbc.co.uk/aboutthebbc/documents/bbc-annual-report-and-accounts-24-25.pdf>
21. *Qualitative audience research by STRAT7 Jigsaw (ongoing) suggests that the government’s role in the appointment process can risk public perceptions that the government has influence over the BBC.*
22. <https://vlv.org.uk/wp-content/uploads/VLV-Report-into-BBC-public-funding-Revised-November-2024.pdf>
23. [https://demos.co.uk/wp-content/uploads/2026/01/Our-BBC\\_Report\\_January-2026.pdf](https://demos.co.uk/wp-content/uploads/2026/01/Our-BBC_Report_January-2026.pdf)
24. <https://www.bbc.co.uk/aboutthebbc/documents/bbc-workplace-culture-report.pdf>
25. <https://www.bbc.co.uk/aboutthebbc/documents/bbc-annual-report-and-accounts-24-25.pdf>
26. *Source: BARB data <https://www.bbc.co.uk/aboutthebbc/documents/bbc-annual-report-and-accounts-24-25.pdf>*
27. *With more people—particularly younger audiences—turning to search platforms, social media and global streaming services as their primary routes to content. Ofcom’s Media Nation report 2025 found that Subscription-Video-on-Demand (SVoD) is the platform children and young adults are most likely to select first when turning on the TV. Twenty-seven per cent of children aged 4-15 choose SVoD as a first TV destination, compared to 26% who select a linear channel and 20% who choose a video-sharing service (mainly YouTube). <https://www.ofcom.org.uk/siteassets/resources/documents/research-and-data/multi-sector/media-nations/2025/media-nations-2025-uk-report.pdf?v=401287>*
28. *This is especially acute among young people – a survey by Ipsos UK of 750 16 to 24-year-olds, 37% said they can’t be friends with someone who holds different viewpoints to their own – a figure significantly higher than those aged 25 and over (21%) – despite being more curious than older generations about different people and cultures. <https://www.bbc.co.uk/aboutthebbc/documents/bbc-unboxd-listening-to-younger-audiences.pdf>*
29. <https://www.bbc.co.uk/mediacentre/speeches/2025/tim-davie-director-general-bbc-catalyst-for-trust>

30. <https://www.ofcom.org.uk/siteassets/resources/documents/research-and-data/online-research/adult-and-teen-news-consumption-survey/news-consumption-in-the-uk-2025-research-findings.pdf?v=400636>
31. <https://www.ofcom.org.uk/media-use-and-attitudes/media-literacy/why-all-of-us-need-to-talk-about-mis-and-dis-information>
32. <https://www.bbc.co.uk/mediacentre/2025/new-ebu-research-ai-assistants-news-content>
33. 40% of people say they sometimes or often avoid the news, up from 29% in 2017, according to the Oxford Reuters Institute Digital News Report 2025.
34. <https://www.ofcom.org.uk/tv-radio-and-on-demand/public-service-broadcasting/the-relationship-between-the-use-of-psbs-for-news-and-societal-outcomes-an-empirical-analysis>
35. <https://www.ofcom.org.uk/media-use-and-attitudes/attitudes-to-news/measuring-the-diversity-of-news-content-online>
36. <https://reutersinstitute.politics.ox.ac.uk/digital-news-report/2025/how-public-checks-information-it-thinks-might-be-wrong>
37. <https://www.bbc.co.uk/ourbbcourfuture>
38. Demos 2025, Our BBC
39. <https://downloads.bbc.co.uk/aboutthebbc/reports/annualreport/2020-21.pdf>
40. <https://www.ofcom.org.uk/siteassets/resources/documents/research-and-data/online-research/adult-and-teen-news-consumption-survey/news-consumption-in-the-uk-2025-research-findings.pdf?v=400636>
41. <https://www.bbc.co.uk/aboutthebbc/documents/bbc-annual-report-and-accounts-24-25.pdf>
42. Survey of 1,047 UK adults 18+ by Yonder from <https://www.bbc.co.uk/aboutthebbc/documents/bbc-annual-report-and-accounts-24-25.pdf>
43. <https://www.ofcom.org.uk/siteassets/resources/documents/research-and-data/media-literacy-research/making-sense-of-media/dis-and-mis-information-research/mis-and-disinformation-report.pdf?v=386069>
44. <https://www.bbc.com/mediacentre/2026/bbc-group-youtube-strategic-partnership>
45. Review of local media in the UK: Part One
46. Ofcom's 2025 Local News and Media Survey found that 93% of UK individuals 16+ using at least one form of local news or information. <https://www.ofcom.org.uk/siteassets/resources/documents/research-and-data/online-research/adult-and-teen-news-consumption-survey/news-consumption-in-the-uk-2025-research-findings.pdf?v=400636>
47. <https://www.ofcom.org.uk/siteassets/resources/documents/research-and-data/online-research/adult-and-teen-news-consumption-survey/news-consumption-in-the-uk-2025-supporting-slides.pdf?v=400932>

48. [https://www.ebu.ch/Publications/Reports/open/EBU\\_Study-debunking-crowding-out-Full-report.pdf](https://www.ebu.ch/Publications/Reports/open/EBU_Study-debunking-crowding-out-Full-report.pdf)
49. *Global Influence & Impact Research: Tapestry Research 2025*
50. *BBC Global Audience Measurement 2024/25. <https://www.bbc.co.uk/aboutthebbc/documents/bbc-annual-report-and-accounts-24-25.pdf>*
51. *Tapestry Research 2025*
52. *Ibid*
53. *Global Influence & Impact Research: Tapestry Research, 2025*
54. *In 2010 the government of the day decided that the licence fee payer should bear the cost instead, transferring the full cost of both the BBC World Service and BBC Monitoring to licence fee payers from 2014, although some direct funding was reinstated from 2016.*
55. *The first round of savings along resulted in a 47 million audience loss – in some cases removing routes for audiences to get trusted news. Many of our audiences rely on the BBC World Service (73% of World Service reach is from low media freedom countries and it reaches 64m people in the 20 most fragile states in the world)*
56. *Building a world-class curriculum for all (2025); Curriculum and Assessment Review; Page 10 [https://assets.publishing.service.gov.uk/media/690b96bbc22e4ed8b051854d/Curriculum\\_and\\_Assessment\\_Review\\_final\\_report\\_-\\_Building\\_a\\_world-class\\_curriculum\\_for\\_all.pdf](https://assets.publishing.service.gov.uk/media/690b96bbc22e4ed8b051854d/Curriculum_and_Assessment_Review_final_report_-_Building_a_world-class_curriculum_for_all.pdf)*
57. *BBC-commissioned Hook research on 21st Century Skills (2025); sample size 400 teachers*
58. <https://www.ofcom.org.uk/siteassets/resources/documents/research-and-data/media-literacy-research/children/childrens-media-use-and-attitudes-report-2025/childrens-media-literacy-report-2025.pdf?v=396621>
59. *Ofcom's Annual Report on the BBC 2024/25*
60. *Ibid*
61. <https://www.bbc.co.uk/mediacentre/2026/bbc-ai-unpacked-to-launch>
62. *The majority of primary commissioning revenue continued to originate from PSBs, with their share remaining steady at just over 83.4 per cent. 2025 Pact Census Shows*
63. *Our Women's Football account on TikTok doubled its followers during the Euros.*
64. <https://www.bbc.co.uk/aboutthebbc/documents/bbc-annual-report-and-accounts-24-25.pdf>
65. *Ofcom Media Nations 2025*
66. <https://www.bbc.co.uk/ourbbcourfuture>

67. *Last year we published our BBC Diversity, Inclusion and Belonging Strategy, which for the first time brings together our workforce diversity ambitions and our creative diversity plans. We are committed to diversity goals 50:20:14:25 – 50% Gender, 20% Black, Asian and Minority Ethnic, 14% Deaf, Disabled and/or Neurodivergent (DDN) and 25% from working class backgrounds. Our ambitions now reflect the industry standard DDN classification.*
68. *It could also open up new commercial and revenue opportunities – covered in Chapter 4 below*
69. <https://www.bbc.co.uk/mediacentre/articles/2026/open-letter-spur>
70. *We believe existing regulation can be modernised. This could include areas such as strengthening expectations around the quality, prominence, and discoverability of trusted PSM news content within AI products, as well as licensing which is set out in Chapter 4.*
71. *Ofcom Online Nation Report 2025: <https://www.ofcom.org.uk/siteassets/resources/documents/research-and-data/online-research/online-nation/2025/online-nations-report-2025.pdf?v=409837>*
72. <https://www.bbc.co.uk/aboutthebbc/documents/bbc-annual-report-and-accounts-24-25.pdf>
73. *Ofcom review on DTT <https://www.ofcom.org.uk/tv-radio-and-on-demand/public-service-broadcasting/future-of-tv-distribution> and PwC study that concluded a fully digitally included nation could be worth as much as £21.2 –£30.8 billion in annual Gross Value Added (GVA) from increased productivity and employment and £4.9–£9.4 billion in net gains to the Exchequer through higher tax revenues and reduced welfare spending.*
74. *DCMS Audio and Radio Review 2026 <https://www.gov.uk/government/news/ministers-kick-off-review-to-safeguard-radios-future>*
75. *BBC analysis, prepared with assistance EY. BBC solely responsible for presented analysis.*
76. *The role of the BBC in creative clusters, PWC, 2022*
77. <https://www.bbc.co.uk/aboutthebbc/documents/bbc-annual-report-and-accounts-24-25.pdf>
78. *BBC analysis, prepared with assistance EY. BBC solely responsible for presented analysis*
79. *BBC analysis, prepared with assistance EY. BBC solely responsible for presented analysis*
80. *Tapestry Research 2025*
81. *Socioeconomic Impact of BBC Children’s and Education: 2026, BBC*
82. *Doctor Who: Economic Impact: 2023, BBC*
83. *Northern Ireland Economic Impact: 2024, BBC*
84. *The Traitors: Scotland Economic Impact: 2025, BBC*

85. <https://downloads.bbc.co.uk/aboutthebbc/reports/reports/creative-clusters.pdf>
86. *SOC1-3 occupations are used as proxy for high value jobs. These jobs include managerial, professional and associate professional roles, where decision making responsibility is a central feature of the work. These roles typically involve autonomy, judgement and complex problem solving, distinguishing them from occupations with more routine task based responsibilities. This distinction is also reflected in patterns of skill mismatch. According to the latest Census, the median skills mismatch rate in SOC1-3 roles in England and Wales was 25%, around 7 percentage points lower than the median mismatch in SOC4-9 occupations.*
87. *BBC analysis, prepared with assistance EY. BBC solely responsible for presented analysis.*
88. <https://northeastscreen.org/north-east-producers-invited-to-pitch-for-the-one-show/>
89. *This includes expenditure on BBC Academy (including BBC Studios), apprenticeships and industry schemes in Content, News and Nations, including BBC contributions to ScreenSkills. It does not include expenditure on individualised training for BBC staff that will be covered by divisional budgets.*
90. <https://www.bbc.co.uk/talent/>
91. *2017: Ofcom Media Nations 2018 (Ofcom / BARB / BARB TV Player (census data) / TouchPoints / ComScore) / BARB As Broadcast. 2025: BARB As Viewed, all devices / Compass by Ipsos UK*
92. *RAJAR, MIDAS*
93. <https://www.gov.uk/cma-cases/googles-general-search-and-search-advertising-services>
94. <https://www.bbc.co.uk/aboutthebbc/documents/bbc-annual-report-and-accounts-24-25.pdf>
95. *2017: Ofcom Media Nations 2018 (Ofcom / BARB / BARB TV Player (census data) / TouchPoints / ComScore). 2025: BARB As Viewed, all devices / Compass data by Ipsos UK*
96. *An independent assessment of the BBC's Efficiency & Transformation Review report, EY-Parthenon, 2026*
97. <https://www.nao.org.uk/wp-content/uploads/2021/12/BBC-savings-and-reforms.pdf>
98. <https://www.bbc.co.uk/supplying/working-with-us/ai-principles/>
99. *We estimate around 9 million adults in the UK, more than half of which are aged 65+, have access to a working TV set in their home but do not have a subscription to Sky or Cable TV, and they do not access to SVOD services (Barb Establishment Survey, Q4 2025).*

100. <https://www.bbc.co.uk/aboutthebbc/documents/a-bbc-for-the-future.pdf>
101. <https://www.bbc.co.uk/aboutthebbc/documents/bbc-annual-report-and-accounts-24-25.pdf>
102. A licence is required to watch or record any programme included in a television programme service as it is being broadcast on a one-to-many basis. The detail is in Part 4 of the Communications Act 2003 and the Communications (Television Licensing) Regulations 2004.
103. A licence is not required for video-on-demand viewing, except for watching or downloading any BBC content on an on-demand programme service provided by the BBC – essentially, currently, BBC iPlayer – including streaming content live. S4C content that is available via BBC iPlayer does not require a licence, because it is provided by S4C not the BBC.
104. In 2023/24 (the latest data available) the licence fee accounted for a higher share of incomes for households at the bottom of the income distribution – 1.37% of net income (after housing costs) on average for the poorest 20% of households, compared with 0.26% of income on average for the richest 20%. For all quintiles the proportion of each household's income accounted for by the licence fee dropped substantially over this Charter period.
105. Ministry of Justice, Criminal Justice Statistics Quarterly, 2025
106. <https://committees.parliament.uk/publications/50289/documents/272446/default/>
107. Licence Fee Brand Tracker by Toluna, 3,771 UK adults 18+ (bill payers), April 2025-December 2025
108. BARB, 4+ households, TV set devices only, April 2025-January 2026
109. <https://www.bbc.co.uk/ourbbcourfuture>
110. <https://www.bbc.co.uk/ourbbcourfuture>

### Case study image credits

National Covid Memorial Wall in London. Credit: BBC / Forest

'AI Confidential with Hannah Fry'. Credit: BBC/Curious Films/Harriet Bird

'Names Will be Made' Campaign. Credit: BBC

Sara Cox and Pudsey Bear. Credit: BBC/Sarah Louise Bennett

'Kingdom'. Credit: BBC Studios/Nick Riddin

Filming set up for 'The Portal' (the virtual venue). Credit BBC





British Broadcasting Corporation  
Broadcasting House  
London  
W1A 1AA

[bbc.co.uk](http://bbc.co.uk) ©BBC 2026