2022: TOWARDS 500 MILLION
At the end of last year, before I was invited to join the Executive Board of the BBC, James Harding asked me to look into the role News could play in helping the BBC reach the Director-General’s target of doubling the global reach of the Corporation to 500m by 2022. It is an ambitious target and I was delighted to take on the task. When James asked me to do it he knew that, although I have spent a great part of my life in the news business, I have never worked for the BBC and my opinions and conclusions would be those of an intrigued outsider.

Over the past few months, I have spent time getting to grips with the BBC - a big job. Trying to understand its inner workings has left me full of admiration but also, at times, confusion. I have met programme makers from the World Service Group who have inspired me with their creativity, their ambition and their commitment to finding the best way of serving their audiences. Whether it was hearing about BBC World News, the mobile first strategy of the Hausa service or the innovation in BBC Trending, I have been impressed by all the staff I have met. I spent time with staff from BBC Worldwide, too, gaining an invaluable insight into the commercial arm of the BBC.

I also went outside the BBC to hear from a range of external voices: from other media companies, from social networks, and from educational bodies amongst others. Everyone I met spoke of the high regard they have for the BBC, and the unique position it has both within the UK and internationally. But many spoke, too, of the frustrations they can encounter when trying to work with the Corporation.

Out of all these conversations has come this report. Let me be clear about what this report is and what it isn’t. This is not a blueprint for the executive to pick up and carry out over the next few years. It is the views of an outsider as to how, if the BBC is committed to doubling its global reach, it might think about doing that over the coming years. Some of the suggestions are ones that could be enacted immediately and without much disruption; others require more thought and exploration as well as investment. It is now for the executive to take this report up and decide what, if any of it, they want to follow up on.

I have greatly enjoyed the last few months as I have got to know the inner workings of the BBC, and I am grateful to all those who have given up their time, both internal and external, to help me in my task.
The BBC is the greatest broadcaster in the world. From drama to entertainment, exploration of the natural world to news, it delivers first class programmes and content, with a reputation for quality that travels around the globe. For more than 80 years the World Service has embodied the core values of the BBC - impartiality and accuracy - exporting British values of accountability, fairness and freedom of speech. More recently, the success of BBC exports such as Top Gear, Doctor Who and Sherlock has cemented the BBC’s reputation for quality, wit, intelligence and originality.

Globalisation and technological innovation are transforming life the world over. New countries are rising in global significance, long-established political norms are being challenged, and more people than ever before have access to the world through television and the internet. A new aspirational global middle class is developing, not wealthy by the standards of the West but with a new found individualism and enough money to give it a consumer power which will soon be felt the world over. Meanwhile the explosion of information available online has meant that the value placed on trusted sources of information and news has never been higher.

It is within this context that the Director-General set the ambitious target of reaching 500 million people a week by the centenary of the BBC in 2022. To understand this purely as a numbers game would be wrong. When Tony Hall first spoke of his ambition to double the global audience of the BBC he said it would be done by improving quality. In other words, by making content that is so good that half a billion people will want to seek it out wherever they can find it.

The global reputation of the BBC has been founded on the World Service and the vital role it plays in providing accurate and impartial news to countries which lack reliable news provision. This mission remains central to the BBC - and the ambition to reach an audience of 500 million around the world does not change this core commitment. It is important to remember the benefits the World Service has brought to domestic audiences, too - because of it UK audiences have received international news coverage characterised by greater breadth, greater depth of understanding and greater insight. Kofi Annan has spoken of the World Service being the UK’s greatest gift to the world in the twentieth century - and this should apply for the twenty-first century as well. If the BBC were to reach 500 million by diluting the mission of the World Service, then it would have failed. This report explores how the BBC can build on and develop this crucial role.

So how can the BBC achieve the Director-General’s target? The first thing to say is that this will need the whole of the BBC to work together. On its own, BBC News currently reaches just over 250m a week internationally. Beyond News there is a wealth of amazing content across the BBC. Although this report focuses on the changes News can make, it is important to recognise that BBC Worldwide with its three new brands, BBC Brit, BBC Earth, and BBC First, will help to drive the BBC’s audience reach. With BBC World News, the BBC’s international 24/7 English news channel, these can provide an important draw to potential partnerships.
INTRODUCTION CONT.

Much good work is already going on within News to increase the global reach of the audience. World Service English is the cornerstone of the World Service Group and will continue to be central to the BBC’s global offer; radio output remains vital and new multiplatform programmes such as Outside Source are exciting developments. WS English remains by far the biggest BBC radio network in terms of audience size - a significant achievement. In the language services, too, experimentation is bearing fruit whether it is the mobile first initiative of the Hausa Service or the social newsgathering of BBC Turkish. New language television bulletins are driving up reach and television will continue to be central to the BBC over the next ten years, as it is currently very effective in driving up reach and awareness. This report does not set out to restate what is already underway; instead it has chosen to focus on areas where transformation is necessary - a change in mind-set, a new service, or a different policy. The most important areas for innovation identified are around the digital offer of BBC News, and the approach to partnerships abroad.

BBC News has a formidable history of identifying a need for reliable news provision around the world and ensuring it has the technology in place to meet that need. This report explores the ways that through a greater understanding of the needs of some audiences, the right responses to technological change, and a true grasp of how best to operate internationally, BBC News can build on past principles to reach an even larger audience in the future.

Focusing primarily on News but spreading more widely where applicable, this report sets out what the obligations and opportunities are for the BBC globally, the actions needed to take advantage of them, and the difficult choices the BBC will need to consider if it really wants to expand reach - and get to an audience of 500 million across the globe.

ACTION POINTS

Mobile and social first
- Make content first for mobile, and to appeal to social audiences
- Accelerate move from broadcasting on social sites to interacting with audiences and gathering news
- Invest resources into a few key services with the greatest potential for digital growth (in particular Arabic, Brazilian (Portuguese), English, Hindi & Spanish), and give them licence to innovate.
- Invest in providing more video and re-versioning it across as many languages as possible
- Establish international opinion forum online

Partnerships
- Consider a comprehensive partnership with another national or international broadcaster, involving deeper newsgathering collaboration
- Develop more language bulletins to be shown on host broadcasters
- Look for opportunities to exploit successful BBC programme brands including The One Show and Countryfile.
- Look for joint venture TV opportunities in mature markets

New opportunities
- The BBC should consider the opportunities to open at least one new language service for an audience facing a severe deficit in free and impartial news - potentially Ethiopia (Amharic), or, if a realistic route to market can be found, North Korea (Korean)
- Examine the case for a multi-genre free to air channel in Africa

Commercial permissions
- The BBC should review policies around commercial activities in markets outside the UK. Specifically, this means looking at:
  - Native advertising on features
  - Reducing internal barriers around sponsorship of globally broadcast Licence Fee content
By 2022 mobile broadband is expected to grow by up to 2.5bn with 1.5bn new users across China and India, and a further quarter of a billion across East Africa, South Africa and Nigeria (with a similar growth elsewhere in Africa).

The weekly reach figures from 2013 suggest radio reached 145m, television around 112m and online around 40m; clearly the overall figure includes some overlap. Significant shifts are underway, however, in the way audiences come to the BBC.

Overall digital reach for the BBC – News and Worldwide - outside the UK stand at a peak of around 150m monthly unique users in March 2014 (a big news month). This is more than CNN but still less than Buzzfeed’s peak of 160m, and only the same as the MailOnline’s 150m monthly audience in English alone. Given Buzzfeed, for example, was only founded in 2006, this raises the question of why the BBC’s global digital reach is not more significant. The BBC digital offer is split across English (which forms the largest segment) and languages sites. Many of the latter are small teams stretched across multiple platforms with digital reach so small as to barely show in their own markets, although they are growing quickly. It is impossible to escape the conclusion that the BBC is punching well below its weight in the digital world. If the target weekly reach of 500 million is to be met, digital is going to be very important and a step change needs to be made to make the most of it.

THE OPPORTUNITY

CURRENT REACH

Currently, BBC News reaches around 256m around the world with World Service, World News and bbc.com/news. Within this there are big audiences in South Asia, Africa, the Middle East and the US. 40% is in English, with stories written for many audiences across the globe. The remaining 60% is in other languages and is more tailored to local markets.

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THE WORLD IN 2022 PLATFORMS:

Mobile
By 2022 mobile broadband is expected to grow by up to 2.5bn with 1.5bn new users across China and India, and a further quarter of a billion across East Africa, South Africa and Nigeria (with a similar growth elsewhere in Africa). These phones will predominantly be used by the emerging middle class in those markets – with a level of disposable income and access to media. Most of the members of this market segment are also expected to be strong social and chat site users, although as chat apps proliferate that audience will be increasingly fragmented.

It is also worth noting that growth in mobile is found in some of the countries facing a severe deficit in free and impartial news. For example, in both Burma and Afghanistan amongst younger audiences there is a small but significant increase in mobile access which looks set to grow over the coming years.

TV & radio
TV access will also grow in most developing markets, taking media consumption from radio, which will become much more local and entertainment driven. Audio will still be important but is expected to move mostly to smartphones as part of a multimedia digital offer; having said that re-broadcaster distribution will continue to be a valuable route to audiences in some markets.
Potential market sizes in 2022
(Adult population who can access that platform – millions)
(Combined Informa & World Bank data, *Estimate only)

MARKETS
Taking that projected growth in mobile broadband access and television, the BBC projections for market growth are as follows:

English (global market segment, plus specific markets in India, Africa and the US)
• Has the potential to see a significant growth in market size (c. 50%) with many of those being language learners who are typical aspirant audiences more likely to have an interest in BBC news.

South Asia
• The largest area of mobile broadband growth.
• This market has a BBC heritage but currently only very moderate levels of penetration.
• The television market for news in India is already very crowded with around 200 news channels.
• Focus on the large languages – Hindi, English for Asia, Tamil, Bangla, Urdu – could see at least 50% increase in reach.

Africa
• English, Hausa and Swahili markets have strong BBC heritage and are the markets with the best penetration.
• In a TV and Digital age it should be possible to maintain that high level of penetration through a strong mobile offer and by launching a TV channel into the relatively immature market to convert the existing audience. However as radio reach is likely to decline this will preserve currently large reach in the area rather than delivering significant additional reach.
• There are also markets in Africa in which the BBC currently has no presence but could be worth exploring on the grounds of languages of need.

### THE OPPORTUNITY CONT.

<table>
<thead>
<tr>
<th>Language</th>
<th>TV Market</th>
<th>Broadband Market</th>
</tr>
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<tbody>
<tr>
<td>Mandarin</td>
<td>88 (Sat only)</td>
<td>719</td>
</tr>
<tr>
<td>India (Hindi + English)</td>
<td>453</td>
<td>393</td>
</tr>
<tr>
<td>Spanish Latin America</td>
<td>265</td>
<td>252</td>
</tr>
<tr>
<td>Indonesia</td>
<td>134</td>
<td>174</td>
</tr>
<tr>
<td>Brazil</td>
<td>133</td>
<td>153</td>
</tr>
<tr>
<td>Arabic*</td>
<td>160</td>
<td>100</td>
</tr>
<tr>
<td>Africa (English)</td>
<td>114</td>
<td>144</td>
</tr>
<tr>
<td>Pakistan</td>
<td>86</td>
<td>67</td>
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<tr>
<td>Bangladesh</td>
<td>59</td>
<td>48</td>
</tr>
<tr>
<td>Hausa</td>
<td>29</td>
<td>42</td>
</tr>
<tr>
<td>Swahili</td>
<td>28</td>
<td>39</td>
</tr>
</tbody>
</table>

Alongside languages the Global English population alone is estimated to grow to about 1.5bn (including foreign language learners).
THE OPPORTUNITY CONT.

Latin America
- Market with limited BBC brand awareness and low penetration levels.
- Latin America has a diverse and well-developed media scene although little global news provision potentially creating an opportunity for the BBC.
- Potential to provide significant growth on current BBC reach.

China & Indonesia
- Markets with limited BBC brand awareness and low penetration levels.
- China is important but is also the most challenging of markets for news, and for the time being looks set to remain that way.
- Indonesia offers the potential for significant digital growth at relatively low cost.
- Despite China’s challenge, with the right product both markets have potential to provide significant growth on current BBC reach.

Middle East
- Through the successful Arabic channel, the BBC has a high level of penetration in this market.
- There is the opportunity to grow this through population growth and increased access to broadband, however significant further penetration with news-only content is unlikely.

AUDIENCES

The BBC’s global audience, across all platforms, sits in two large categories. The first: people living in the countries of greatest need, places where choice of news media is restricted by poverty, oppression or lack of a functioning state. The second: developed and developing media markets. In the latter, the audience breaks down into a large and growing audience of young people (18-34) in developing countries, as well as an audience of older and wealthier people worldwide.

Audiences with the greatest need
In 2022, audiences facing a severe deficit in free and impartial news will still be at the heart of the BBC’s global mission. The majority of these are in Africa, where the BBC broadcasts in Arabic, English, French, Hausa (northern Nigeria), and Somali; but also include markets such as Burma and Afghanistan. In many of these markets the BBC is a provider of both local news - about the country and region – and global news. In these countries of need, the BBC should be committed to maintaining the current level of services, although the languages served may change over time.

There are currently some countries with no access to reliable news that the BBC is not reaching and could consider. It is worth looking at Africa. For example, with at least 93 million people, Ethiopia is the second most populous country in Africa. A service in the national language Amharic, could reach a significant number. Elsewhere too there are still a number of countries where media freedom is curtailed, including North Korea which is generally accepted to have one of the least free media industries in the world. Although there are significant obstacles put in place by the government, an impartial, accurate news service would be enormously valuable to the people of North Korea.
THE OPPORTUNITY CONT.

The emerging global middle class
There is also a significant growing middle class audience in the developing world which the BBC should be reaching, and must reach if it is to achieve the target set down by the Director-General. In these countries, there is often good and diverse local news provision but a lack of in-depth international news on offer.

This audience breaks down into two distinct groups: an older, wealthier audience which primarily comes to news through television and a younger audience for which the internet is increasingly the primary source of news. Moreover the internet is fundamentally a social experience for this audience which wants news that both informs and has social currency.

FOCUS FOR THE BBC FOR 2022
Given that broad picture of market growth and where the audience will be, what should the focus be for the BBC?

• The combination of the growth in mobile broadband and the growth in the young, aspiring global middle class dictates that the BBC must focus on serving the needs of that audience in whichever market it is operating in.
• Continuing to serve audiences with the greatest need: the BBC World Service must continue to serve audiences around the world where reliable, impartial news isn’t available. Resources in existing services should be maintained, although the World Service must keep an open mind about whether it is serving the right audiences and should consider creating new services where necessary. Specifically, the BBC should explore opportunities to open a service in Amharic for Ethiopia and continue to consider whether there is a way to serve the population of North Korea
• Investing in markets with the largest growth potential: to serve global audiences as effectively as possible the BBC needs the best offer in the languages with greatest reach. It should aim to invest in digital leadership and TV presence in:
  • Hindi, Bengali and Urdu for South Asia
  • Spanish and Portuguese for Latin America
  • English (and less heavily Hausa) for Africa
  • Global English, in particular digital services
  • China – through English learning
  • Indonesian – a lower investment but with high digital potential
PRINCIPLES FOR GETTING TO 500M

Be a Digital Leader

Any hope of reaching 500 million is going to rely heavily on a successful digital strategy and this means the BBC has to be a digital leader – and not a broadcaster with a digital add-on. With an estimated 2-2.5bn people gaining access to mobile broadband in the next 10 years, the potential gains for the BBC are enormous.

This won’t happen with the current BBC digital offer. The BBC has the advantage of great journalists, a breadth of content across languages and English sites, access to domestic BBC technology investments and, as an organisation, a heritage in video. And yet despite all these advantages the BBC is, currently punching below its weight digitally. The language sites are growing quickly, but from such a low base that their reach and market penetration continues to be minimal. BBC.com has a good starting position but will have to innovate and grow significantly from its current position if it is to take its place at the centre of the BBC’s global English offer.

Key to success in the digital space is going to be the speed and boldness with which the BBC moves. Within News, after a strong start, the BBC has not been as fast to innovate online as other news providers. If it is to take advantage of the growth in mobile broadband, the BBC must be quick to spot trends and to understand how social is developing.

To take advantage of this great opportunity, the BBC needs to focus on the following:

Prioritise mobile

Fundamentally, the BBC has to shift its focus from putting traditional broadcasting first to putting mobile first. By 2022, the BBC should be mobile first in every market outside the UK.

Within that, the BBC must pick its digital champions based on a combination of the biggest markets and markets where there are interesting opportunities for growth. The BBC has identified the following top languages:

<table>
<thead>
<tr>
<th>Current biggest services</th>
<th>Markets with digital growth opportunities</th>
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<tbody>
<tr>
<td>Global English</td>
<td>Hindi</td>
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<tr>
<td>Spanish in Latin America</td>
<td>Hausa (Nigeria)</td>
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<tr>
<td>Brazil</td>
<td>Urdu</td>
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<tr>
<td>Arabic</td>
<td>Turkish</td>
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<tr>
<td>Persian</td>
<td>Indonesian</td>
</tr>
<tr>
<td>Russian</td>
<td>China – but with restrictions</td>
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From these languages a number should be prioritised in terms of resource, with the biggest resource going to the largest markets, i.e. English, Latin America, Arabic and Hindi. The BBC must also prioritise between platforms. At the moment, some of the key language services risk being held back because resources are spread too thinly across different platforms. Language services must have the freedom to prioritise key platforms and move resources accordingly.

In some language services where the potential for the current website is limited, different approaches should be taken to use the resources most efficiently. Focusing on podcasts or making a home solely on social media sites could be more effective in some markets. Curating re-versioned global stories from major language sites using external translation or in-time automation could both expand the offer and free up resources. It is worth noting, however, that were the BBC to go down this latter route, there is a risk that the product would not be of a high enough quality to cut through in a competitive market where the BBC currently has little purchase.
Once it has prioritised languages and resourced teams, the BBC needs to tailor its content for mobile. This means identifying the interests of the audience and tailoring the news offer to reach those; the young aspiring classes are more interested in softer, or ‘near news’ content which has social currency, such as entertainment, technology trends, health, and accessible business stories. The publishing cycle should be continuous and the writing of the stories should be punchy and concise, reflecting the way the audience reads stories on mobile.

Maximise social
For the audiences the BBC is trying to reach globally – both in markets of need and emerging middle class markets – social media, accessed on mobile, is increasingly of crucial importance. Whether it is the global English market, students in Burma or young professionals in India, social networks are hugely important in terms both of access to news and passing news on. If the BBC is to successfully deliver news to this audience, it needs to crack social news provision.

The key to this is conquering social sharing which, in turn, is dependent on a good understanding of the audience. Take a look at the approach of Buzzfeed. Buzzfeed’s impressive 140-160 million monthly unique users worldwide has been built up on the principle of social sharing; that is: people passing stories on to friends and those friends coming to read them on the Buzzfeed website. By comparison, whilst the BBC is the most tweeted news organisation globally, this doesn’t automatically translate into hits on the website in the same way as Buzzfeed. The conundrum for the BBC is how it turns that recognition into greater reach.

The answer lies in encouraging journalists across all services to respond to the shifting needs and tastes of a specific audience. To be as effective as possible in serving audiences online journalists must have the freedom to tailor their output to appeal to them. The headline has to cut through, and the tone and storytelling must be relevant to the target audience, encouraging them to return.

This is not about dumbing down. It is about having an acute understanding of the audience and making news relevant to them in the same way Newsbeat and Newsround write stories online which, while never deviating from the core journalistic values of the BBC, present each story in a way which is particularly relevant and engaging for the target audience.

In the main markets the BBC is targeting, there should also be investment in social newsgathering. BBC Turkish has led the way experimenting with this in the BBC and in 2013 it had an average of 22% of direct traffic from social media, as opposed to 4% for bbc.com/news.

Optimise video
In a digital world, video integrated into a news story is increasingly crucial for success. The BBC is in a very strong position to offer great video content; it has an enviable news archive and a formidable number of reporters around the world. There is already some very impressive work going on including by the Global Video Unit which reversions material from World Service languages. But more must be done.
The BBC needs to make it a priority to have great video; this means ensuring archive video is used wherever possible, but also making sure reporters in the field know that their first priority is to provide video for online. The crucial point here is that the digital audience does not have the same expectations of video as the audience for an evening news television bulletin; the video should have immediacy, relevance and character.

Distinctive offer
Underpinning all this is the need for the digital offer to have character that will punch through to the audience. Within the UK, BBC News has distinctive programme brands with a strong, defining character. Often that character is defined by the presenter or presenters, but it also comes from the choice of stories, the range of guests, the diversity of opinion and the tailoring of the output to the intended audience. These programmes adhere to BBC values but interpret impartiality as a representation of a good range of opinion rather than not having any opinion at all. Online, the BBC has taken a different approach. It presents itself with the neutral tone of a news bulletin. When looking at the competition online, it is clear that the sites that are growing quickly – whether it is Vice or Buzzfeed or Upworthy – are the ones that have a really distinctive character.

In terms of the English language site, the BBC needs to think about how it can add character and personality. The BBC cannot offer an opinion of its own but it could – and should – explore curating opinion online. One idea the BBC should explore is hosting an international op-ed page on its website. This could host a range of opinions from world leaders and globally interesting voices which bring together debate and insight. The BBC’s global reputation helps it get significant interviews and there is no reason why a BBC international opinion service should not have the same draw for international figures.

In terms of the language services, the desire to provide a distinctive offer should allow the opportunity for a radical re-think of how services in big markets are run. They are still small in country and, therefore, have more freedom to act like start-ups, aiming to disrupt the market. In this context, language services should aim to have an acute understanding of their audience, an agenda that serves that audience, and the technology to respond quickly to the audience’s needs. Each service should be given the freedom to create an offer which truly serves its target audience. If the audience the BBC is targeting in these markets is young and aspirational, the service the BBC is providing needs to be agile and responsive to serve the audience’s changing habits.
PRINCIPLES FOR GETTING TO 500M CONT.

PARTNERSHIPS
To be truly ambitious about how wide an audience can be reached, the BBC must open up to partnerships. It will need to use the brand resonance it already has to form partnerships to generate more localised content and to distribute it more widely. Building on existing partnership experience the BBC needs to find ways to do the partnerships that have been seen as ‘too hard work’, while keeping the editorial independence that creates that brand appeal.

Social partnerships
Although much of what the BBC can do on social and chat apps does not need a formal partnership, building better relationships can make a genuine difference to what it can achieve. Chat app providers have shown a willingness to work with the BBC in multiple markets to make it easier for their users to get BBC content. But at other times the BBC has shown an unwillingness to work with digital organisations on collaborative projects. While these may not have had a significant direct impact on reach they are the kind of opportunity that marks the BBC out as either a potential partner or too difficult to deal with. The BBC should aim to build working partnership relationships with all big and all the significantly growing new social and chat apps, looking for opportunities to improve or promote content for those audiences.

Mobile partnerships
On mobile having your app in front of a user has become key to getting their attention and commitment. That makes mobile operators (as well as social sites) important gatekeepers. There are real opportunities to build partnerships with mobile operators (and potentially handset manufacturers) to pre-load BBC news apps onto handsets in some key markets. To do that the BBC News apps in those languages or for those markets must stand out. That will mean investing in development and in video content (the draw for mobile operators looking for subscribers to start to use data) for a small number of key languages, such as Turkish, where there is already operator interest.

Television partnerships
Television is one of the most powerful ways to reach new audiences around the world. There are three principal ways the BBC could explore this area:

• A deeper approach to collaboration with other national or international news organisations. Drawing on their journalists to make BBC reporting better and using the BBC’s global network of reporters to give them a different international dimension, and increase the BBC’s exposure.

• Developing more international news bulletins to be broadcast on host broadcasters; this is an extension of the current model operated by the TV Unit in Global News which has proved very effective in extending reach. The TV Unit currently serves nine languages by translating a core of BBC content from English, as well as making programmes in a variety of lengths. It supplies content to partner stations as well as streaming video online on BBC websites. Bespoke bulletins could be made more frequently (say twice daily) and delivered in other languages. The TV Unit strongly believes that there would be demand for this from partners.

The BBC needs to find ways to do the partnerships that have been seen as ‘too hard work’.
BBc should…

build on its most successful – and unique – ‘near news brands’…
The One Show…
Countryfile.

**PRINCIPLES FOR GETTING TO 500M CONT.**

- In mature markets of Latin America and India look for opportunities for co-branded channels. There are clear challenges here: BBC editorial independence is essential and in markets that limit foreign ownership editorial control must be clear and the risks carefully managed. But for those big and costly markets it can give the BBC a way to reach audiences it couldn’t afford to otherwise. Existing interest from media organisations shows the potential here.

Away from direct news provision, two additional strategies for extending television reach should be explored. Firstly, the BBC should look to build on its most successful – and unique – ‘near news’ brands, seeking partners to make them for local language markets. This builds on the recently announced global version of Newsbeat. Two that stand out are The One Show, rightly known for its mix of celebrity, entertainment and current affairs, and Countryfile. In addition, the BBC should look for more opportunities to produce Newsround internationally. Newsround is a unique proposition, offering comprehensive coverage of world news tailored to 6-12 year olds. In each case, it would be cost-effective to reversion films produced for the domestic outlet in different languages and to work with a local partner to build the content around those films.

Additionally, the rise of video aggregation opportunities online offers the BBC new, simplified, ways to engage with a large number of smaller partners. If it were to focus on increasing the amounts of its own video it creates, there is an opportunity to extend reach and awareness by syndicating a selection of that widely available through such aggregators. The BBC would be the provider of content even if it does not own the distribution, although some control would still be essential.

**NEW OPPORTUNITIES**

New language services

As set out earlier, serving audiences who otherwise have no access to accurate and impartial news is absolutely fundamental to the global proposition of the BBC and it is crucial the BBC keeps assessing whether it is serving the right audiences.

This report has had neither the time nor resource to investigate fully the feasibility of new services but a couple of areas stand out as worth exploring.

Firstly, in Africa there are a number of languages the BBC could consider. For example, in Ethiopia, a service in the national language Amharic, could reach 5 million Ethiopians weekly. Given where the market is, it could make sense for this to initially be a simple mobile model developing into a mobile driven digital offer. North Korea remains one of the least open countries in the world. Given the lengths the government goes to in order to block outside media, the BBC needs to continue to consider how it could best serve the population, either with a news service on radio or digital or through other BBC services such as English language teaching.
One significant new television opportunity for the BBC... is the launch of a TV channel in Africa.

**New television opportunities**

As stated in the introduction, television is central to the strategy of reaching a greater audience by 2022 and this report does not intend to re-state current strategy.

One significant new television opportunity for the BBC, which would not rely on partnerships, is the launch of a TV channel in Africa. The localisation of the radio market in Africa and the decreased demand for World Service on partners threatens a large key audience. A TV market in early development offers the chance to convert that audience to a BBC channel (as was achieved in Arabic). Such a channel could carry not just news but a range of genres to widen its appeal. Taking advantage of the development of digital television in Africa, such a channel would be offered free to air. The channel would require the buy in both of Worldwide and News and would, in the short to medium term, require a BBC-wide commitment to provide the investment and accept the loss of some revenue in order to secure the long term position of the BBC in Africa.

It is important to note that both new language services and an Africa channel would require investment to establish, and that previous assessments have suggested that neither could be funded purely commercially.

**English language learning**

The Chinese market remains a significant challenge due to the restrictions on news. However given the scale of the opportunity and the genuine need for information it is one where the BBC should be more ambitious. English language learning offers a genuine opportunity to reach this market and establish long term awareness of the BBC. Partners in China have already expressed interest in an expanded BBC offer.

As well as delivering greater reach in China, English language learning could also add reach globally and, in a multi-billion dollar market, provide a commercial return. In 2012 the market for people studying English in their home country was estimated at $50 billion. This market is forecast to grow at over 25% per annum from 2012 to 2017. According to the British Council, there are over 1.5 billion people learning English worldwide of whom only 15% are following formal English language teaching provision. Meanwhile language learning is going digital. In the period 2011-2016, spending on digital English language learning products will have risen by over 40% in Malaysia, over 30% in China, and over 20% in Indonesia and Brazil.

Whilst there is no suggestion the BBC should be building schools and employing teachers itself, looking around the BBC it is clear that there is general recognition internally that globally the BBC sets the gold standard for English and whilst it cannot provide the teaching expertise, it can provide a wealth of content to help bolster a curriculum in partnership with an education specialist.

This is a highly competitive market and success is not guaranteed. For the greatest impact the BBC should bring together activities across World Service and Worldwide into a single concentrated approach in China and globally.
The BBC will need to have a more open stance towards innovating in advertising... if it is to continue to generate the income it needs.

**COMMERCIAL MINDSET**

The structure of the BBC – established by Royal Charter, primarily funded by the licence fee – has conditioned the way the BBC operates in foreign markets. Broadly speaking the BBC’s position has been cautious as it has sought to ensure that operations abroad have not damaged the BBC’s reputation at home. Commercial revenue has been a welcome addition rather than a core part of the BBC’s income.

It is right that the BBC has taken an approach which seeks first to protect its reputation but in many markets the BBC is now operating as a commercial broadcaster and it needs to embrace the local norms of the markets it is operating in; it needs to be happy to make money that can be invested in providing better quality services at home and abroad.

There are a number of areas the BBC should look at again to assess whether there is scope for a looser approach which would allow the BBC to operate according to local market norms. Probably the most significant is the area of native advertising. BBC.com/news native ads around feature content could generate around $2 million a year. The BBC should consider this. More generally it will need to have a more open stance towards innovating in advertising outside the UK and a greater willingness to consider whether it can make new formats work for its brand if it is to continue to generate the income it needs. The BBC should also avoid creating extra barriers to commercial income through being reluctant to take sponsorship outside the UK for programmes that were made in the UK with Licence Fee income.

Finally, the BBC should look at the rules around handling users’ data. As projects such as MyBBC bring an increasing opportunity to understand audiences, and as advertising money moves more and more to personalised adverts, the BBC must plan upfront how it will use all the data at its disposal outside the UK for commercial as well as site experience purposes – and aim to make sure its systems and the messages given to international audiences allow it to do that.
In 2022 the BBC will reach its centenary. With the World Service as the cornerstone, it has established a global reputation for excellence, impartiality and first class programme making.

The target of doubling global reach by 2022 has provided a timely opportunity to reassess the BBC’s global role in the emerging digital media world. The BBC should not seek to reach 500 million weekly for the sake of it. Rather, that reach figure is the expression of a desire for the BBC to provide even better content than it already does; content of a quality which draws in an audience of half a billion across television, radio and online.

Central to any global role must be the services to the audiences facing a severe deficit in free impartial news which are at the heart of the World Service. Provision of impartial, accurate, accessible news to audiences where there is no other reliable news provision has long been at the heart of the BBC’s mission and must remain so. That mission embodies the values that make the BBC such a well-loved institution at home and abroad. It is a mission which, for many years, has greatly enriched the quality of international reporting on the BBC in the UK. The BBC must do more than preserve those services, it must also look to see where new services might be needed.

Building on that core provision, BBC News must look to how it can transform itself to best serve audiences around the world. Fundamental to this has to be a commitment to putting digital first in all markets other than the UK. The rapid growth of mobile broadband around the world – including in markets of need – must compel BBC News to reallocate resources and change ways of working so as to best meet audience needs. Despite being a large news organisation, the BBC needs to demonstrate the agility of a start-up in responding to rapidly changing habits and expectations.

The BBC needs to do all this whilst still maintaining the quality of television and radio services it currently broadcasts around the world. More than that, the BBC must continue to look for new opportunities – more partners for language service TV bulletins, a multi-genre channel in Africa, a new language service in Ethiopia – which will further reinforce the mission of the BBC.

Moving to digital first, whilst still maintaining radio and television provision, is not straightforward. In order to achieve it, the BBC will need to become more open in outlook, particularly when it comes to partnerships. It needs to become more confident in sharing its content and platforms where appropriate and in engaging in partnerships where it will not have full editorial control. This requires a significant shift in mind set within the BBC; nonetheless it is necessary if the BBC is to continue to have the global recognition it deserves. In addition, it needs to become more commercially oriented, or at least less hesitant about raising revenue outside the UK. Among other things this should include exploring raising money from various kinds of advertising and sponsorship.

This is an ambitious plan of action. But now is the time for the BBC to be ambitious. For many years, it was dominant in a world of analogue broadcasting on radio and television. The biggest challenge the BBC faces is whether it has the capacity to evolve from being an analogue behemoth into a corporation agile enough to respond with speed and dexterity to the demands of the digital world. It has started moving in the right direction but it needs to move farther and faster if it is to enjoy the global reach the Director-General has called for.

CONCLUSION

Now is the time for the BBC to be ambitious.