

Institution: University of Glasgow (UofG)		
Unit of Assessment: 34 Communication, Cultural and Media Studies, Library and Information Management		
Title of case study: Supporting Television Production: Liberalising International Trade Environment and Informing UK Policy		
Period when the underpinning research was undertaken: 2011– present		
Details of staff conducting the underpinning research from the submitting unit:		
Name(s):	Role(s) (e.g. job title):	Period(s) employed by submitting HEI:
Gillian Doyle	Professor of Media Economics	2007–present
Period when the claimed impact occurred: August 2013–31 st December 2020		
Is this case study continued from a case study submitted in 2014? N		
1. Summary of the impact		
<p>The dominance and commercial success of large US-based film and television suppliers in exporting audiovisual content, relative to European-based companies, is a major challenge for industry policy-making. Professor Gillian Doyle’s research on the changing environment for international trade of IPRs (intellectual property rights) in the audiovisual sector has informed and shaped the OECD’s design of a major policy-related initiative aimed at promoting international trade in audiovisual content. In the UK it has also informed organisations such as the BFI and Ofcom, helping to support the economic sustainability of indigenous content suppliers and ultimately helping strengthen the creative economy.</p>		
2. Underpinning research		
<p>The underpinning body of research comprises two related strands of work carried out by Professor Gillian Doyle since 2011 and funded by differing external bodies:</p> <ul style="list-style-type: none"> (i) Audiovisual Trade and Cultural Policy (funded by the OECD); and ‘Windowing’ strategies for audiovisual businesses (ii) Television Production in Transition (funded by the ESRC). <p>Together, these two projects comprise a body of work that has generated important insights into changing conditions for international distribution and commercial exploitation of television content.</p> <p>(i) Promoting Liberalisation of Trade: From 2011 to 2014, Doyle developed research on international trade in audiovisual content and, related to this, was invited to give guidance and input to the OECD (Organisation for Economic Co-operation and Development) as they developed a new Trade Restrictiveness Index for audiovisual services in member states. The index is a research-based tool that analyses potential impediments to international trade in TV content. This OECD-commissioned research on trends and issues affecting international trade flows, such as technological change, regulatory interventions, globalisation and copyright enforcement, helped to inform and shape the work of the OECD as it created the Services Trade Restrictiveness Index (STRI) for Audiovisual Services, a tool for policymakers. The research generated insights into factors that affect the audiovisual sector, such as monopolies and monopolisation, and the influence of interventions such as quotas and subsidies. Crucially, it shed light on the relative potency of these factors, which would in turn inform Doyle’s contribution to the STRI’s weightings, and enable the tool to measure the impacts of particular changes, and thus inform policy and corporate strategy.</p>		

Doyle also carried out further research (funded by the AHRC CREATE programme) on the use of windowing strategies to exploit IPRs in audiovisual content. ‘Windowing’ is the term given to the process of managing the release sequence for television content across differing ‘windows’, or potential audience outlets. Digital convergence means that digital content can be consumed in multiple forms: for example, a television programme might be broadcast but also sold to one or more streaming platforms. The research examined the effect digital convergence has on opportunities available to owners of IPRs to television content. Doyle’s work illuminated how distribution strategies in the television industry are adjusting to the spread of digital platforms and devices, findings which can enable IPR owners to exploit these rights more effectively.

(ii) Shaping UK Policy: The second strand is a major ESRC-funded research project (2017-2020) on which Professor Doyle was Principal Investigator that examined how, driven by changes in technology and the rise of globalised distribution platforms, the structure of ownership of the television production sector has shifted over recent years and the implications of these changes for public policy. This project was undertaken collaboratively with the Head of Research (until 2017) at the British Film Institute, Richard Paterson. At the core of it was the question of how the size and corporate configuration of a television production company affects its business performance and content. How do differing parental ownership arrangements affect, for example, ability to finance production, maximise the value of IPRs, and achieve sustained economic success? This research, by informing Ofcom about the policy measures required to support small indigenous television production companies in an increasingly globalised and competitive distribution environment, was aimed at supporting the economic sustainability of indigenous content suppliers and hence strengthening the creative economy.

3. References to the research

- 3.1 Doyle, G. (2019) [‘Public policy, independent television production and the digital challenge’](#), *Journal of Digital Media and Policy*, 10(2), pp. 145–162. (doi:[10.1386/jdmp.10.2.145_1](#))
- 3.2 Doyle, G. (2018) [‘Television production: configuring for sustainability in the digital era’](#). *Media, Culture and Society*, 40(2), pp. 285–295. (doi:[10.1177/0163443717717634](#))
- 3.3. Doyle, G. (2016) [‘Television production, Funding Models and Exploitation of Content’](#). *ICONO14*, 14(2), pp. 75–96. (doi: [10.7195/ri14.v14i2.991](#))
- 3.4 Doyle, G. (2016) [‘Digitisation and Changing Windowing Strategies in the Television Industry: Negotiating New Windows on the World’](#), *Television & New Media*. 17(7), pp. 629–645. (doi:[10.1177/1527476416641194](#))
- 3.5 Doyle, G. (2011) *Audio Visual Services: International Trade and Cultural Policy*. Commissioned Study for OECD, Paris: OECD. [available on request from HEI]
- 3.6 Doyle, G (2013) [‘Understanding Media Economics \(2nd ed\)](#), London: Sage Publications. ISBN 9781412930765. [available on request from HEI]

Quality: these outputs have been peer-reviewed and 3.5 was commissioned by the OECD, with Doyle’s work between 2011–2012 funded by an OECD grant and the research is expected to meet or exceed the 2* threshold.

4. Details of the impact

Research based input to OECD: Promoting liberalisation of trade

The [STRI](#) features a regulatory database, composite measurements of identified factors restricting audiovisual trade across territories, and an online policy simulator. The expertise

Doyle contributed to its design included the distinctive economic attributes of audiovisual (primarily film and TV) content, associated tendencies towards monopolisation and market dominance, and conflicts surrounding copyright, unauthorised cross-frontier spillage of content and territoriality. The OECD Senior Policy Analyst at the time [5.1, 5.2], noted that she had invited Doyle as a *'leading expert in the Audio-visual sector'*, adding in an email to Doyle that her research-based expert input: *'...made a significant and valued contribution to our understanding of these sectors and to the final design of the STRI tool. We were particularly influenced by your insights about sector-specific forces such as ... monopolisation[,] quotas, subsidies [and] copyright restrictions... your input helped us navigate sensibly the range of possible restrictions and how to weight them and without this the AV STRI would not have been the same'* [5.1].

The impact of the STRI, which came into operation in 2014, has been to facilitate the OECD's work in promoting liberalisation of trade, specifically in the audiovisual sector. This unique, evidence-based diagnostic tool is available to policy-makers to clarify those restrictions that most impede trade, growth and employment, to benchmark themselves in comparison to global best practice and to scope out reform options. Data collected by the OECD confirms usage of STRI tools, as well as policy changes that tend towards greater liberalisation, including in television and broadcasting [5.3]. [PACT Industry Reports](#) also indicate an increase in trade between 2015–2016. The OECD's former Senior Policy Analyst commented that: *'given subsequent changes in the political environment, the timeliness of the work we carried out on the STRI is striking. Through the interaction that my colleagues and I have had with trade delegates and policy-makers from across OECD member states, we are satisfied that the STRI tool, including for Audio-visual, has been widely used, and, in building understanding about obstacles to global services trade, has helped to inform and shape policy-making at every level'* [5.1].

The tool has helped international policy advisory bodies to better understand potential impediments to international trade in the audiovisual sector, and contributed to more informed and effective national strategies for support of audiovisual industries and trade, with related cultural implications. For example, use of the STRI and of Doyle's research [3.5; 2014] has raised awareness within UK bodies responsible for audiovisual support, such as the British Film Institute (BFI), of forces affecting international trade in film and broadcasting. This in turn has helped shape and influence evolving debates about support measures for these sectors. The BFI's Head of Research and Scholarship stated in 2014: *'The information assembled in the STRI about impediments to trade and investment is very useful [as is] being able to compare levels of intervention across differing countries... especially interesting from a policy perspective is how interventions designed to support audiovisual production interact with underlying economic, market and technological forces affecting international trade and [Doyle's] research study for the OECD ... illuminates this interplay very well... [It] has been very helpful in developing understanding of the drivers affecting cross-border trade in film and broadcasting'* [5.4].

Doyle's research on windowing [3.3] is also being integrated by users evolving effective content distribution strategies to exploit the value of their audiovisual IPRs. The Chief Content Officer for video entertainment company MultiChoice Africa stated that the research on windowing had been very useful for himself and colleagues in industry [5.5], in particular for *'...thinking about the effects of convergence and the rise of SVoDs [subscription video on demand], the growing importance of digital rights, and in getting to grips with how best to exploit opportunities in what is clearly an increasingly complex and competitive global marketplace'*.

Research-based input to Ofcom: Protecting the sustainability of UK 'indies'

Doyle's current research is illuminating how, as ownership in the television production sector has

undergone seismic transformations, this has affected the business performance and content of truly independent UK producers or ‘indies’, compared with that of consolidated, often US-based, production companies. This work is relevant for policymakers at the UK’s media and telecommunications regulator, Ofcom, which aims to build a policy environment and support systems conducive to the sustainability and success of UK-based independent television content producers [5.6].

An important and widespread trend has been successful independent production companies being acquired by larger conglomerates, and this research clarifies why this is and its implications for policy. Of particular interest to Ofcom is Doyle’s finding that acquired production companies benefit from improved access to production financing, market intelligence and distribution but that, simultaneously, there is sustained public interest in locally-owned content making [3.1; 3.2]. Following engagement with the Director of Content Policy and Head of Competition Policy, Doyle was invited by Ofcom to provide expert input to the organisation’s 2020 consultation on Public Service Media (including broadcasters) based on the findings of her project [3.1]. She briefed the Director of Content Policy and her team in September 2020 as part of the *Small Screen: Big Debate* consultation.

Doyle’s input helped inform and shape thinking on this key area of policy. As the Director of Content Policy at Ofcom explained, this research prompted her *‘to think about the policy environment surrounding public service media (PSM) and the role that PSM play in promoting renewal and sustainability amongst independent television content producers.’* She added that Doyle’s input had also *‘helped highlight the relationship between PSM and the broader UK creative economy. At the heart of this relationship, currently, is the terms of trade regulation, and your point about whether, in a changing television environment, a definition of ‘indies’ that focuses only on vertical cross-ownership remains appropriate is one we will want to keep at the forefront in thinking about the design of support for the sector in the future.’* [5.7]

Through its innovative approach to the challenges facing the television industry, the research promotes a more accurately calibrated approach to future policy support for small indigenous production companies, thus strengthening a culturally significant sector, and an important contributor to the UK creative economy.

5. Sources to corroborate the impact

- 5.1 Testimonial letter, OECD Senior Policy Analyst, undated [received Nov 2019] detailing the value for OECD of Professor Doyle’s expertise-based input to the STRI tool, and the success of the tool itself in achieving its goals [PDF]
- 5.2 Email from OECD, dated 2nd March 2011, inviting Doyle to speak to the OECD Trade and Agriculture Directorate on broadcasting, with the reason given being that they had read her published work in the field [PDF].
- 5.3 OECD Report, 2019: especially pp 4, 6, 12, 23, corroborating levels of usage of STRI tools as well as increasing liberalisation of trade generally. [PDF]
- 5.4 Testimonial, BFI Head of Research and Scholarship, 9 September 2014, corroborating the value of the STRI and OECD report for the BFI in terms of the relationship between policy interventions and other forces affecting international trade in AV content. [PDF]
- 5.5 Testimonial, Multichoice Africa, dated 21st March 2018, corroborating and detailing the usefulness of Doyle’s research on windowing [PDF]
- 5.6 Email, Economic Director, Ofcom, dated 25th February 2020, inviting Doyle’s contribution to a roundtable event on the Future of Public Sector Broadcasting, and requesting

permission to link to her published research, corroborating its relevance in this discussion and for Ofcom as an organisation [PDF]

5.7 Testimonial letter, Director of Content Policy, Ofcom, undated [2020], corroborating and detailing the influence of Doyle's research and consultancy on policy thinking. [PDF]