

# Public Broadcasting in the Year 2020 – Development of a Roadmap of Challenges for Public Service Broadcasters till the Year 2020

Prof. Dr. Artur Lugmayr, Hao Zheng  
EMMI Lab., Tampere Univ. of Technology (TUT)  
POB. 541, FI-33101 Tampere, FINLAND  
[artur.lugmayr|hao.zheng}@tut.fi](mailto:{artur.lugmayr|hao.zheng}@tut.fi)  
<http://www.tut.fi/emmi>

A. Lugmayr, M. Friedrichsen, and H. Zheng, "Public broadcasting in the year 2020: Development of a roadmap of challenges for public service broadcasters to 2020," G. F. Lowe, F. Martin, and P. Chadwick, Eds. Melbourne, Australia: The University of Sydney, September 2012. [Online]. Available: <http://ripeat.org/conference2012/workgroups/>

# Public Broadcasting in the Year 2020 – Development of a Roadmap of Challenges for Public Service Broadcasters till the Year 2020

Public broadcasting has undergone a tremendous change in recent years and is confronted with various new trends in form of newly emerging digital services. With the introduction of new technologies public broadcasters are faced with the challenge to create additional value for consumers by adding value to core services via social media platforms, content personalization, audience measurements, personal living archives, etc. Within the scope of this article, we elaborate the future of public service broadcasting and especially focus on the development of a roadmap till the year 2020. We identified several challenges (see Figure 1), which will be discussed within the scope of this research work. We define how and which new digital services will have impact on the management of public broadcasting stations, and especially how added value for audiences can be created by introducing new digital services.

We create a roadmap of potentials and impact of newly emerging digital services for public broadcasters till the year 2020. To achieve this goal, we combined two methods: First, we utilize the Delphi Technique to gain expert opinions on the various factors that impact public broadcasters till 2020; second, we analyse the interviews and apply a Driving Forces Analysis to identify the forces and strategically changes for public broadcasters, and identify the key-issues and impact of these till the year 2020; third, the results are compared with existing studies and literature (e.g. published by EBU, DVB, or SMPTE) discussing the future of broadcasting. As result we obtained a roadmap for public service broadcasters till 2020, which including several strategic challenges in the broadcast environment.

As basis for this analysis we conducted 5 expert interviews with public broadcasters – namely RBB (Germany), YLE (Finland), ORF (Austria), ABC (Australia), and BBC (UK). As underlying method we are conducting a thorough interview analysis, and asked experts from the above mentioned broadcast stations about their vision of public broadcasting in the year 2020. As result of the interviews we obtained various scenarios, challenges, and trends in the upcoming years. These trends are clustered and resulted in the key-driving forces for public broadcasters till the year 2020. The interviews were conducted via phone, and the following themes and topics will be analysed according the following challenges:

- Which financing and business challenges will public broadcasters face in the year 2020?
- Which organizational challenges in terms of productions will public broadcasters face till 2020?
- What regulatory and policy challenges will public broadcasters face in 2010?
- Which technological challenges emerge due to the emergence of new digital services till 2020?
- Which challenges do broadcasters face from the consumer viewpoint in 2020?
- How will public broadcaster challenge value changes coming from audience side till 2020?
- Which technologies and services will become mainstream till 2020?

The main aim of the study is the presentation of challenges, potentials, and scenarios that public service broadcasters are faced with till the year 2020. It shall guide public broadcasters in terms of new developments in technology, audience behaviour, organizational changes, and new business models. It rounds up with potential scenarios, and a visionary view towards how public broadcasting

will be in the year 2020, and shall guide decision making processes to be prepared for eventual changes.

The results of the research work are based on the outcomes of the TEKES funded NELME project conducted with leading Finnish partners involved in the broadcasting sector.

#### References (selected)

- [1] Ville Ollikainen, Erkki Aalto, Leena Norros, Anu Seisto, Artur Lugmayr, Ulf Lindqvist. New Electronic Media (NELME) – Summary of State of the Art Studies.
- [2] Stefan Ried, Holger Kisker, Pascal Matzke, Andrew Bartels, Mirosław Lisserman, Forecast: Global Public Cloud Market Size, 2011 To 2020, *FORECAST RESEARCH*, APRIL 21, 2011
- [3] [Nick Adamo](#), What Makes a Great Partnership? *CISCO BLOG*, MAY 12, 2008  
[http://blogs.cisco.com/sp/what\\_makes\\_a\\_great\\_partnership/](http://blogs.cisco.com/sp/what_makes_a_great_partnership/)
- [4] Lester Ho, Jan Markendahl, Miguel Berg, Business Aspects Of Advertising And Discovery Concepts In Ambient Networks, *PERSONAL, INDOOR AND MOBILE RADIO COMMUNICATIONS, 2006 IEEE 17TH INTERNATIONAL SYMPOSIUM ON*, 2006: 1-5, DOI: 10.1109/PIMRC.2006.253998
- [5] Jason Kincaid, YouTube Officially Launches Ads You Can Skip, *TECH CRUNCH*, DECEMBER 1, 2010  
<http://techcrunch.com/2010/12/01/youtube-officially-launches-ads-you-can-skip/>
- [6] [Trefis Team](#), Netflix Needs To Go Deep Into Personalized Streaming, *FORBES*, JUNE 10, 2011  
<http://www.forbes.com/sites/greatspeculations/2011/06/10/netflix-needs-to-go-deep-into-personalized-streaming/>
- [7] Michael Weiss, G. R. Gangadharan, *MODELING THE MASHUP ECOSYSTEM: STRUCTURE AND GROWTH, R&D MANAGEMENT, VOLUME 40, ISSUE 1, PAGES 40–49, JANUARY 2010, DOI: 10.1111/J.1467-9310.2009.00582.X*
- [8] Anderson Chris, *THE LONG TAIL: WHY THE FUTURE OF BUSINESS IS SELLING LESS OF MORE. NEW YORK: HYPERION (2006), ISBN 9781401309664*
- [9] Adriana Waterston, *VOD and DVR in the Home-- A Glimpse of the Future*, SkyReport, July 7, 2005,  
<http://www.horowitzassociates.com/white-papers/vod-and-dvr-in-the-home-a-glimpse-of-the-future>
- [10] Andreas M. Kaplan \*, Michael Haenlein, *Users of the world, unite! The challenges and opportunities of Social Media*, *Business Horizons* (2010) : 53, 59—68
- [11] Alexander Oster alder, Yves Pignut, [Business model generation: A handbook for visionaries, game changers, and challengers](#), JOHN Wiley and Sons. Inc, July 13, 2010