

Constitution, Europe, External Affairs and Culture Committee
Thursday 29 May 2025
18th Meeting, 2025 (Session 6)

Ofcom and BBC Scotland

1. The Committee has agreed to follow up on its [23 January 2025](#) meeting with the BBC with a further meeting with the Director of BBC Scotland and her colleagues.
2. BBC Scotland issued an announcement on [River City to come to an end in 2026 as BBC plans next generation of drama production in Scotland with three new titles](#) on 18 March 2025.
3. There was a [member's debate on 24 April 2025](#) on “BBC Scotland's Decision to End River City and Close its Dumbarton Studios”, informed by motion [S6M-16978](#), lodged by Neil Bibby MSP on 27 March 2025.
4. On [15 May 2025](#) the Committee took evidence from Equity.
5. The Committee recognises that the Parliament has no role in the operational or editorial decisions of BBC Scotland.
6. We will also be hearing from Ofcom this week. Ofcom's work relates to scrutiny of the work of the BBC. It also regulates commercial television and radio and undertakes research into consumers' habits.
7. The witnesses this week are—

Ofcom panel

- Cristina Nicolotti Squires, Group Director, Broadcasting and Media Group, Ofcom
- Glenn Preston, Scotland Director, Ofcom

BBC Scotland panel

- Hayley Valentine, Director, BBC Scotland
 - Rhodri Talfan Davies, Director of Nations, BBC
 - Luke McCullough, Corporate Affairs Director, Nations, BBC and Head of Corporate Affairs, BBC Scotland
8. There is a SPICe briefing on Ofcom at **Annexe A** and a paper from Ofcom at **Annexe B** and a SPICe briefing on the BBC at **Annexe C** and paper from BBC Scotland at **Annexe D**.

Clerks

May 2025

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Constitution, Europe, External Affairs and Culture Committee

29 May 2025

OFCOM

Introduction

The Committee will take evidence from Ofcom. Ofcom's work intersects with a number of elements of the Committee's work. Notably the scrutiny of the work of the BBC and its impact on the media and culture landscapes in Scotland.

Ofcom also regulates commercial television and radio and undertakes research into consumers' habits.

Ofcom's functions

Ofcom, the UK's communications regulator. It was established in 2003, replacing and taking over the functions of several regulators. Ofcom has a range key functions, including:

- Regulating TV, radio, and video-on-demand sectors. This includes the BBC.
- Overseeing fixed line telecoms, mobiles, and postal services.
- Regulating online safety and ensuring regulated services (such as social media, video sharing platforms, search engines) take appropriate steps to protect their users.
- Managing the radio spectrum, ie licensing and regulating the airwaves used by wireless devices to prevent interference and ensure efficient use.
- Protecting consumers from scams and bad practice. Ofcom also has duties to support media literacy.
- Promoting competition.

These functions are intended to help ensure that communication services in the UK are reliable, safe, and of high quality.

The work of Ofcom is reserved. Nevertheless, there are areas of its work that influence devolved policy areas and can support the work of the Committee.

Media nations report

Every year, Ofcom publishes research on consumer behaviours and key trends in the media sector. Ofcom produces a report at the UK level and for Scotland, Wales and Northern Ireland. The most recent reports were published in July 2024. At a UK level, [Ofcom highlighted](#) the following key points from its 2024 report:

- The decline in broadcast TV's reach accelerated in 2023, although for every age group the amount of viewing declined at a slower rate than in the previous year.
- Overall viewing of TV and video increased in 2023, driven by online platforms, including video-sharing platforms such as YouTube, and broadcasters' own services such as iPlayer and ITVX
- Revenues for commercial broadcasters fell in 2023 amid an economic downturn, almost completely offsetting the continued growth of online video revenue.
- Public Service Broadcasters' (PSB) first-run spend and output fell in 2023, after 2022's record highs. The high spend in 2022 were driven by Covid impacts and the cyclic nature of major sports events.
- The Subscription Video on demand (SVoD) market (E.g. Netflix, Prime, Disney+ etc.) has matured, with subscriber numbers plateauing, and ad-supported tiers positioned to drive future growth.
- There were mixed performances within commercial radio's overall growth, while consumer spend on recorded music continues to rise.
- While listening continues to shift online, record numbers of listeners tune into radio weekly, and average listening time is up year on year.
- Reach of music streaming and podcasts is increasing gradually, with signs of potential growth among those aged 55 and over.
- Live radio listening via a radio set is still the most popular form of audio in cars, but smartphone connectivity and access to streaming services are also important.

Media Nations Scotland 2024

Ofcom's Media Nations Scotland report reviews key trends in the media sector in Scotland, covering TV, radio, and digital media.

TV and Video

The report noted that BBC Scotland had proposed reducing peak-hour news broadcasts from 250 to 125 hours per year. The proposed changes were [approved by Ofcom in August 2024](#). The Ofcom statement noted that:

“The BBC must be transparent about how it is delivering for audiences in Scotland, and we will hold it to account. We expect the BBC to monitor the impact of the changes it has proposed and be ready to continue to adapt as necessary to meet audience needs. We will also monitor performance and will report on it in our Annual Report on the BBC next year.”

The main impact of the change is to replace the hour-long news programme ‘The Nine’, with a thirty-minute programme at 19:00. It was [announced on 9 December 2024 that this will be called Reporting Scotland: News at Seven](#). There is also a new current affairs podcast called Scotcast.

The 2024 Media Nations report noted that STV Studios has expanded significantly, merging with Greenbird Media and securing new commissions, including from Netflix, Sky and Discovery.

The report also highlighted BBC ALBA had announced a major Gaelic drama series, *An t-Eilean*. The report noted that this aligned with “MG ALBA’s strategic focus on producing high quality content”.

TV Connectivity

The report noted that in early 2024, 93% of Scottish households had a TV set, with 35% subscribing to traditional paid-for services like satellite and cable. The proportion of households relying solely on Digital Terrestrial Television (DTT) services fell to 26%, down from 30% 2023. Internet Protocol Television (IPTV) services remained limited, with only 4% of households using them.

Almost three-quarters of TV users in Scotland with internet access had connected TVs in 2024, which is similar to the UK average. Access the internet could be through smart TVs, set-top boxes, streaming sticks, or game consoles.

93% of homes had an internet connection, with 87% using fixed broadband. Superfast broadband was available to 95% of homes, and full-fibre services were available in 52% of premises.

Viewing Trends

Average daily TV viewing in Scotland is just under 5 hours, which is the second highest of UK nations (after Wales). The report stated—

“Audiences in Scotland watched the most content from broadcasters, jointly with Wales. This figure includes live TV, recorded TV and broadcaster video-on demand (BVoD) and accounted for 57% of all viewing time (2 hours 51 minutes). Of this, two hours were live TV viewing, and 21 minutes were BVoD. The time spent viewing content on video-sharing platforms (VSPs) e.g.

YouTube, was highest in Scotland, out of all the nations, while viewing of subscription video-on-demand (SVoD) services, e.g. Netflix, and advertising-supported video-on demand (AVoD) services, e.g. Pluto TV, was lower in Scotland than in Wales.”

While viewers in Scotland watch more broadcast TV than in other nations, average daily minutes watching broadcast TV declined by 7% in 2023 compared to 2022. Older adults watch the most TV.

Ofcom reported that “the main five PSB channels accounted for a combined 51.1% share of the total broadcast TV audience in Scotland; this was a decrease of 3.6 percentage points from 54.7% in 2022.” BBC1 was the most popular channel in each of the 4 nations of the UK.

In Scotland, 68% of PSB viewers expressed satisfaction with PSBs overall; this is similar to the UK-wide average of 67%. Around 12% of viewers were dissatisfied, which is again similar to the UK-wide average. When considering individual channels, around 79% of viewers were satisfied with Channel 4, followed by BBC Two (74%), BBC One (73%), and BBC Scotland (72%). Satisfaction was slightly lower for STV (68%) and Channel 5 (65%).

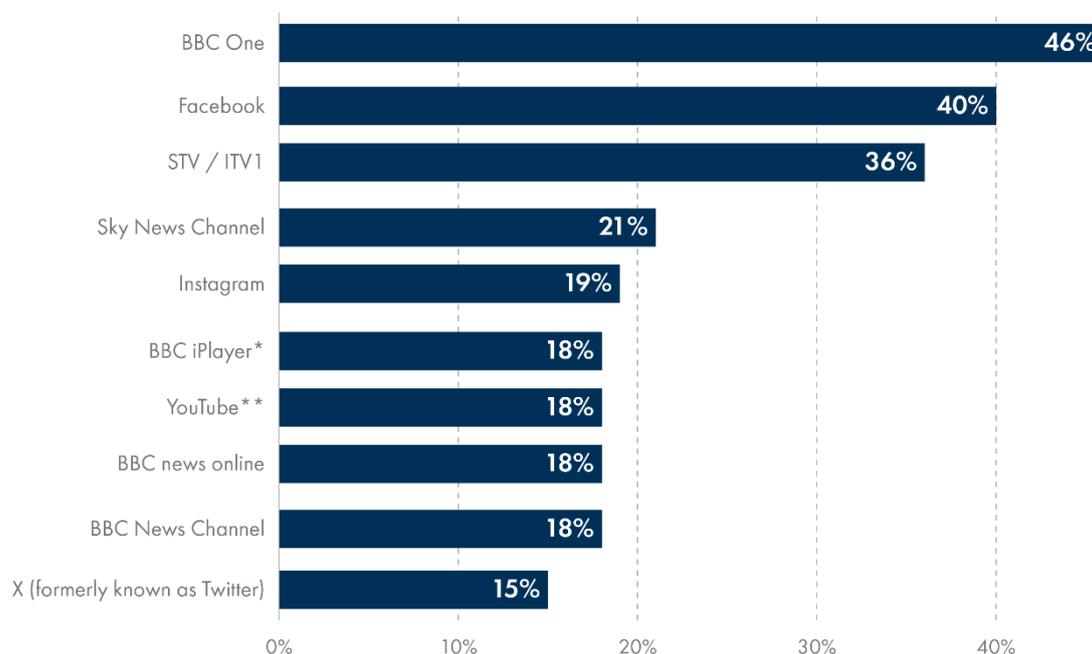
Trusted and accurate UK news was deemed the most important attribute for PSBs as reported by 50% of Scottish audiences, followed by a wide range of programme types (46%) and programmes that help understand current events (30%). Positive perceptions of PSBs delivering content that features Scotland and local areas improved, with 57% of viewers appreciating regional programmes and 56% valuing programmes featuring Scotland, both higher than previous years and the UK average.

The report noted that “Netflix was the most popular SVoD service in Scotland, followed by Amazon Prime Video and Disney+” and that “levels of satisfaction with SVoD services remain high”. (including all of the Broadcaster VoD services), BBC iPlayer was the most popular VoD service (including other broadcasters’ VoD services) and satisfaction with BVoD overall was reported to be high.

[News Sources](#)

Ofcom reported that BBC One is the most-used news source, followed by Facebook and STV/ITV1. The chart below shows the top ten sources of news in general in Scotland.

Top ten sources of news in general in Scotland: 2024



Source: Ofcom News Consumption Survey 2024 – Combined F2F and ONLINE sample. *BBC iPlayer added in 2023. **YouTube moved from 'other online' to 'social media' in 2024 and figures are therefore not comparable with 2023

Ofcom also reported that there is high interest in news about Scotland, with BBC One and STV being the top sources for local news.

TV Programming for Scotland

Ofcom reported that PSB spend on first-run content for Scotland increased by 2.4% to £75.8m. Both the BBC and STV/ITV increased their spend on programming for Scotland.

In terms of network content produced in Scotland, Ofcom reported that—

“Across all the PSBs in 2023, 7.0% of qualifying first-run network spend was allocated to programmes qualifying as Scotland productions, and 8.7% of hours. Both increased compared to 2022, and were driven by proportional increases from both the BBC and Channel 4.”

Radio and Audio

Across Scotland BBC radio stations occupy three of the top five radio stations by market share. Nevertheless, Ofcom reported that, “commercial radio accounted for the majority (60.6%) of total radio listening across Scotland ... the majority was to local commercial stations such as Tay FM, Original 106 and Nation Radio Scotland, with UK-wide commercial services faring less well by comparison.”

Ofcom noted the regional nature of commercial radio in Scotland, it said—

“Across the Central Belt, Bauer’s Clyde 1 and Forth 1 take the number one and number three spots respectively. Both stations are part of Bauer’s Hits Radio Network and share some simulcast content, but retain local news, traffic and travel, and some programming – most notably breakfast shows with George Bowie and Cassi on Clyde 1 and Boogie, Arlene and Marty on Forth 1. BBC UK-wide stations featured much more prominently in the North of Scotland.”

The number of adults listening to podcasts continues to grow. Ofcom reported that in 2024 around 20% of adults listen to a podcast once a week. This has more than doubled since 2018.

Report on the BBC

Ofcom is responsible for holding the BBC to account on behalf of audiences for delivering its remit. It publishes an annual report on the BBC detailing its performance against the regulatory conditions. The most recent report was published in [November 2024](#) and referred to 2023/24 financial year.

The BBC’s [most recent operating licence](#) was published on 2 March 2023 and came into effect on 1 April 2023. It was last updated on 6 August 2024 to incorporate changes to BBC Scotland news provision (discussed above). It sets out the regulatory conditions that the BBC must comply with, as well as how Ofcom intends to hold the BBC to account for delivering this remit.

Quotas are a key feature of the operating licence and legislation government the BBC, and there are over 70 of them in total. There are also several requirements detailed in the licence including: criteria for the BBC’s online services; the need for services to cover a broad range of content; and an expectation that niche areas are covered even if they attract smaller audiences.

Some of the quotas and requirements specific to programming in Scotland include:

In relation to each of BBC iPlayer, BBC Sounds, the BBC Website, BBC One Scotland, BBC Scotland, BBC Alba, BBC Radio Scotland and BBC Radio nan Gàidheal, the BBC must provide content of interest and relevance to audiences in Scotland, including a broad range of content which reflects Scotland’s culture.

BBC Scotland must show original productions for a minimum of 75% of programming hours.

In Scotland, Northern Ireland and Wales, programming should include indigenous language content and a broad range of genres.

25% of qualifying programmes must be made by independent producers.

The BBC must ensure that in each calendar year at least 8% of the hours of network programmes made in the United Kingdom are made in Scotland and at least 8% of the expenditure of the BBC on network programmes made in

the United Kingdom is linked to programme production at different production centres in Scotland.

More information on the operating licence can be found in the [SPICe blog on the topic](#).

Overall findings

The Ofcom report on the BBC for 2023/24 found that –

“the BBC has continued to deliver its remit this year. We base our assessment on a wide range of evidence, including the extensive consumer research and stakeholder engagement Ofcom conducts throughout the year.”

The main findings of the report were that –

- The BBC continues to face challenges in reaching younger audiences, though it is still widely used and valued overall.
- The BBC plays a significant role in delivering high-quality news and current affairs that audiences can trust.
- The BBC is developing its services to better reach all audiences, but it has not explained its overarching strategy for reaching DE audiences.
- The BBC has met its requirements for protecting fair and effective competition and complying with content standards in BBC programming.

The report also briefly discusses the potential implications of the [Media Act 2024](#), noting that –

“Alongside our implementation of the various cross-industry measures of the Act, we are feeding into discussions between Government and the BBC about any necessary changes to the BBC's Framework Agreement to reflect this.”

Review work will also take place over the next couple of years to enable Ofcom to assess “the overall extent to which the BBC is fulfilling its Mission and promoting the Public Purposes.” This work is aimed to feed into the Charter review process.

Findings relating to Scotland

The report takes a specific look at how the BBC performed across the nations, including in Scotland. It states that in 2023/24 the BBC met all of its Operating Licence conditions that relate to Scotland.

Ofcom found that in 2023/24 “audience reach remains high in each of the nations” and that “BBC is meeting its commitments for diverse commissioning.” It also noted that changes made by the BBC have “made its local and nations and regions content more easily discoverable on its online services.” The report, however, states that:

“there remains more to do to better represent disabled people and those from a working class background off-screen / off-air. We are still expecting an updated workforce diversity and inclusion plan for the coming years.”

The report highlights the success of BBC Radio 1’s Big Weekend in Dundee and the associated outreach events for local young people as an indicator that the BBC “delivered programming that helps bring communities together across the nations and regions.”

Ofcom highlight the fact that their analysis shows that audience satisfaction with how well the BBC reflects, represents and serves the diverse communities of all the nations is lower than that of its other public purposes.

The report also stated that while spending on first-run UK programmes for the nations and regions was stable year-on-year, output continued to fall, with a 4% drop since the previous year. In Scotland, however, spend was slightly up with £66.2m spent on content in 2023 compared to £64.6m in 2022. Output was also up in Scotland, with 1,263 programming hours in 2023 compared with 1,209 hours in 2022.

It also found that while spending across the board was stable, spend on first-run originated news and current affairs fell by 3% and 19% respectively.

Committee evidence session with the BBC

The Committee took [evidence from the BBC on 23 January 2025](#). On this occasion the Committee heard from the Director General, Tim Davie CBE.

Mr Davie emphasised the key role of public service broadcasting in the current media landscape, he highlighted the challenges facing the industry given the changing media landscape. [He stated](#), "The level of jeopardy is high, and we all have some very big decisions to make in relation to the media market and where it goes." Mr Davie also said, "public service broadcasting gives us the ability to invest for the public good."

Mr Davie discussed the financial pressures on the BBC, he said, "Our income has been reduced by 30 per cent in real terms since 2010," and stressed the importance of making strategic choices to maintain relevance amidst inflationary pressures and competition from large internet companies. Mr Davie highlighted the BBC's commitment to local and national news coverage.

Mr Davie highlighted Scottish programming such as "Scotland: The New Wild" and the new Gaelic drama "An t-Eilean." He said, "we are very proud of what we are doing and we think that, overall, we should be championing our precious ecosystem in Scotland."

The Committee explored the desire to broadcast Scotland national team games on free-to-view TV and the coverage of Scottish Parliament. These issues were the subject of a follow-up letter to the BBC. One of the issues noted by Haley Valentine in relation showing Parliamentary proceedings on BBC Scotland was that a change would require agreement from Ofcom. She said—

“When we launched BBC Scotland, we negotiated with Ofcom about what that looked like. In order to make any change to that, in regulatory terms, we would have to go back to Ofcom. We do not do that terribly often. We did it for the news changes that we made recently, but it is not a straightforward process. When we do that, we have to give an audience-need reason for making the changes.”

The implication is that the process for a variation to the operating license could be onerous.

Quotas and definitions of national/regional productions

When the Committee took evidence from the BBC in January, the Committee also explored the definitions of what would count as a Scottish production under Ofcom’s rules. The discussion focused on *The Traitors* which has been defined as a Scottish production. This mirrored discussions at the Scottish Affairs Committee earlier in January. In a [letter to the SAC, the BBC said](#)—

“Series one was allocated to Scotland on the criteria of substantive base and that one of the other two criteria was met out-of-London across the nations and English regions, with the title allocated to Scotland in line with Ofcom’s regulatory position. The proportion of spend across each nation/region is not published. To be clear then, data relating to production budget spent in Scotland for series one or data relating to the proportion of staff working on the production in series one who were Scotland-based is not published anywhere, as series one was allocated to Scotland on the criteria of substantive base, not on spend or staffing in Scotland.”

The letter reported that the BBC and Screen Scotland had been working with the producer, Studio Lambert Scotland, on “training and development relating to specialist reality television production”. The letter also said that the number of Scotland-based production staff has increased between series one and series two.

[Ofcom sets out the rules](#) for how a programme’s geographic allocation is determined. These rules are complex, but, in brief, since 2021 three criterion are used to determine the nation/region allocation:

- Substantive base - The production company must have a substantive business and production base in the UK outside the M25. The production in question must be managed from that substantive base.
- Production spend - At least 70% of the production spend must be spent in the UK outside the M25.
- Off-screen talent - At least 50% of the production talent (i.e. not on-screen talent) by cost must have their usual place of employment in the UK outside the M25.

Generally, which nation or region a production is allocated to, is determined if at least two out of three criteria apply. Where each of the criteria have a different location and the substantive base is outside of London, that criteria would be used to determine the allocation (this is what happened in the case of *The Traitors*). There are a range of scenarios and Ofcom's [detailed guidance](#) explains how these criteria interact and how geographic location is determined.

The guidance which has been in force since 2021 strengthened previous guidance in a range of areas, including in relation to determining the substantive base. The rationale for that criterion is included in Ofcom's guidance:

“The objective of this criterion is to embed TV production in the nations and regions to achieve a degree of permanency that can stimulate and build viable production ecologies outside the M25. We consider that to satisfy this criterion, the company making the title will have an authentic presence in the nation or macro-region in which it has its office and will be contributing to that local area's creative economy on an ongoing basis.”

The regional production quotas only apply to first-run programmes on the main networks which are made within the UK and exclude news. Different broadcasters have different quotas. These are set out below:

BBC

- Overall: 50% of programmes by spend and hours made outside the M25.
- Out of England:
 - 8% spend/hours in Scotland.
 - 5% spend/hours in Wales.
 - 3% spend/hours in Northern Ireland.
- English Regions: 30% spend/hours in English regions.

Channel 3 Services (ITV/STV)

- Overall: 35% of programmes by spend and hours made outside the M25.

Channel 4

- Overall: 35% of programmes by spend and hours made outside the M25.
- Out of England:
 - 9% spend/hours out of England.

Channel 5:

- Overall: 10% of programmes by spend and hours made outside the M25.

Arguably the different quotas reflect the different funding and governance arrangements of the PSBs, the BBC and Channel 4 have more detailed and/or challenging targets than Channel 3 and Channel 5.

Ofcom agreed Channel 4's new licence in October 2024. This licence will increase the Made Out of England (MoE) spend/hours to 12% from 2030. This is less than the total for the BBC – 16%. This is also roughly the percentage of the population of the UK that lives in Scotland, Wales and Northern Ireland. Ofcom helpfully included these arguments and a rationale for its decisions in relation to the new licence [in a statement](#). In this it said—

“We have decided to increase the level of Channel 4's MoE quotas from 9% to 12% from 2030. This represents a continuation of a significant increase since 2019 when the quota levels were 3%. An increase of this scale implemented sustainably will benefit audiences and the production sector in the nations and will be achievable for C4C. We consider that increasing the quota to 12% strikes an appropriate balance between continuing to secure C4C's investment in distinctive UK content that appeals to a broad range of audiences across the UK and allowing it flexibility to develop its content and distribution strategy in support of its digital transformation.”

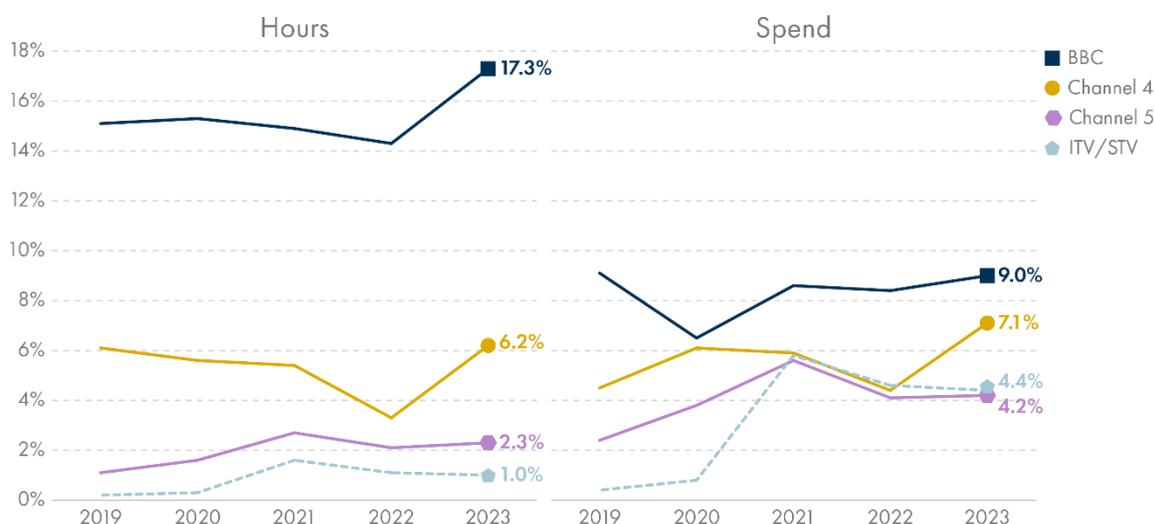
There were also calls for nation specific targets rather than an Out of England target. Ofcom decided not to do so and highlighted issues to do with capacity and risks that small numbers of productions not being renewed could have a large impact on whether quotas would be met. It said—

“Although we have decided not to set nation-specific quotas, we have decided to retain the requirement that in each calendar year MoE spend must be referable to production centres in Scotland, Wales and Northern Ireland. This ensures that C4C cannot meet its quota in only one or two of the nations, and that each year it must contribute spend to production centres in each nation. This is an enforceable part of the licence condition. We also use our annual SMCP Report to track the level of spend in each nation, and to improve transparency regarding how C4C is delivering in the nations.”

Ofcom also agreed new licences for Channel 3 services and [Channel 5](#). The regional production quotas for those services did not change.

The chart below is from the Media Nations report and shows the percentage of hours/spend for each of the PSBs.

Proportion of qualifying network production in Scotland, by PSB: 2017-2023



Source: Ofcom/broadcasters

Online Safety Act 2023 and Media Act 2024

The Online Safety Act 2023 and Media Act 2024 both have and will affect Ofcom's role. These are UK Acts and on reserved topics but may have indirect impacts on devolved areas of policy.

Online Safety Act 2023

The Online Safety Act received Royal Assent on 26 October 2023. The purpose of the Bill was to protect children and adults online by imposing new duties on social media companies and search services to ensure user safety, while preserving and enhancing freedom of speech online.

Some of the key provisions of the Act are:

- Platforms must implement systems to reduce illegal activity and remove illegal content.
- Strongest protections are for children, preventing access to harmful content and providing reporting mechanisms.
- Adults will have more control over the content they see, with platforms needing to be transparent about harmful content.

Further information about the Act can be found on the [UK Government's website](#).

Ofcom will regulate online safety. It published an implementation [roadmap on 17 October 2024](#). Ofcom has carried out several consultations since the Act received Royal Assent. Ofcom is responsible for developing guidance and codes of practice

for platforms to meet their duties. Ofcom will have significant powers of enforcement, such as the power to fine companies up to £18 million or 10% of their worldwide revenue for non-compliance.

Media Act 2024

The Media Act 2024 makes a number of changes in relation to Public Service Broadcasters, VoD, Commercial Radio, and the Listed Events Regime.

In terms of PSBs, the Act reflects the changing media landscape in a number of ways. It introduces a new online availability and prominence regime for PSB TV apps. This will require platforms designated by the Secretary of State to ensure that certain PSB TV apps are available, prominent, and easily accessible. The Act will also update rules on how quotas for independent productions are measured and taking to account digital only platforms. The Act will also allow Channel 4 to produce its own programmes.

The Act amends the "listed events" regime, so that qualifying services can only be provided by a PSB and updates the range of services which fall within scope, e.g. including internet programme services.

The Act provides that Ofcom will develop a video-on-demand code for major streaming platforms such as Netflix, Amazon Prime and Disney+. [Ofcom explains](#)—

“These services will be subject to editorial standards similar to the ones that protect people from harmful content on broadcast TV. This means we will be handling complaints about content shown on these platforms. Streaming services will also be subject to accessibility requirements such as subtitling, so more disabled people can access this content.”

In relation to Commercial Radio the explanatory notes accompanying the Act state—

“This Act removes a number of regulatory burdens, including requirements on stations to provide specific genres of content, as well as amending OFCOM’s duties around localness to focus on a narrow duty to secure the availability to listeners of local news and information.”

The narrower duty means that Ofcom is no longer required to secure that stations provide non-news local material. One of the consequences of this was that [Bauer Media Group chose to make changes to its output in Scotland including the removal of several locally based breakfast programmes](#).

BBC Charter Renewal

The BBC’s mission is set out in the [Royal Charter](#) and is “to act in the public interest, serving all audiences through the provision of impartial, high-quality and distinctive output and services which inform, educate and entertain.” The current charter began on 1 January 2017 and ends on 31 December 2027. Broadly speaking, [the current charter covers the following areas](#):

CEEAC/S6/25/18/1

- The BBC's mission, public purpose, and activities
- Constitution and governance of the BBC
- General duties of the BBC
- Funding
- Regulation, compliance and reporting

The areas included in the 2017 charter that specifically reference Scotland or the devolved nations include:

- **Article 6:** The BBC should ensure that it provides output and services that meet the needs of the United Kingdom's nations, regions, and communities. This includes providing local and regional news, as well as programming that reflects the diversity of the country.
- **Article 13:** The BBC must enter into partnerships with a wide range of organizations throughout the nations and regions of the United Kingdom.
- **Article 14:** The BBC must ensure it reflects the diverse communities of the whole of the United Kingdom in the content of its output, the means by which its output and services are delivered (including where its activities are carried out and by whom) and in the organisation and management of the BBC. The BBC must ensure that its output and services overall provide a duly accurate and authentic portrayal and representation of the diverse communities of the whole of the United Kingdom. The BBC must support the regional and minority languages of the United Kingdom through its output and services and through partnerships with other organisations.

There are also a range of articles around reporting duties, governance, accountability to the Scottish Parliament and the Charter renewal process which make particular reference to Scotland.

The Charter sets out the BBC's five purposes. These are:

- To provide impartial news and information to help people understand and engage with the world around them
- To support learning for people of all ages
- To show the most creative, highest quality and distinctive output and services
- To reflect, represent and serve the diverse communities of all of the United Kingdom's nations and regions and, in doing so, support the creative economy across the United Kingdom
- To reflect the United Kingdom, its culture and values to the world

The BBC reports on these purposes and some of the indicators used in the annual report relate to these purposes directly.

In January 2024 the UK Department for Culture Media & Sport published the [BBC Mid-Term Review](#). It made 39 recommendations for the BBC and Ofcom to update the [Framework Agreement that sits alongside the Charter](#). The changes included:

- Requiring Ofcom to regulate the BBC's online public service material
- Changes to the oversight of the BBC complaints process
- New powers to Ofcom to use different types of assessment in relation to the BBC

The mid-term review also looked ahead to the full review of the Charter in 2027. It states that the full review will include:

“an opportunity to assess the BBC's progress on its 'Across the UK' strategy, published in March 2021, including looking at how successfully the BBC has delivered on plans to move power and decision-making away from London and into the nations and regions.” (p.100)

On 17 December 2024, Stephanie Peacock, Parliamentary Under Secretary of State at the Department for Culture, Media and Sport (DCMS), [said the UK Government intends to launch the Charter review during 2025. This would involve, among other things, a consultation exercise and engagement with the devolved governments:](#)

“the Government will launch a charter review with the aim of addressing some of the challenges we are discussing today and delivering a renewed charter by the end of 2027 that will support the BBC not just to survive but to thrive long into the future...It will be an opportunity to consider what the BBC is for, how it delivers for audiences and how it should be funded, governed and regulated against a rapidly changing media environment. The charter review will also look to uphold the BBC's independence and ensure that it maintains the public's trust...

“Charter review is a well-established process, and our next step will be to publish the terms of reference... setting out the objectives we wish to achieve. We will ensure that we take all relevant views into account as part of the review...Once we have consulted widely, considered the views of stakeholders and assessed the evidence, we will outline our policy direction for the next BBC charter in a White Paper in 2026.

“There will also be an opportunity to place a draft charter before both Houses before the current charter expires in 2027. The devolved Governments will be a key part of the conversation.”

The Scottish Parliament, along with the Scottish Government, has a formal consultative role in the process of reviewing the BBC charter. The [Smith Commission](#) MoU requires that the following happens:

- DCMS consult the Scottish Government on the draft terms of reference for the Charter Review in advance of their publication

- DCMS consult the Scottish Government throughout the process of reviewing the Charter.
- The Scottish Government lay the draft Charter and Framework Agreement before the Scottish Parliament and the Scottish Parliament can do a ‘take note’ debate on the content.
- DCMS consult the Scottish Government before recommending to His Majesty in Council that the draft Charter is granted.

Ofcom will contribute to the charter renewal process. The Committee may wish to explore Ofcom’s view on the areas where the BBC’s activities and output could better support both consumers and content producers in Scotland. In 2020 Ofcom undertook work considering the future of Public Service Broadcasters. [Small Screen: Big Debate – the future of public service media](#) included a number of recommendations, including:

- There should be a revised set of objectives, supporting the transition from public service broadcasting to public service media. There should be a new objective to support the UK’s creative economy.
- Broadcasters and producers need to work together to deliver content for broadcast TV and online audiences.

On 15 May, the Committee was told by Equity that the infrastructure and talent development of the BBC is crucial to the wider industry and supports investment from international streamers.

Ned Sharratt, Researcher (Education and Culture)

SPICe

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Constitution, Europe, External Affairs and Culture Committee

Thursday 29 May 2025

This paper provides an overview of Ofcom's current work relating to broadcasting and the regulatory framework for the BBC to inform the upcoming session on Thursday 29 May 2025. It covers three broad areas of Ofcom's work relating to the broadcasting sector:

- Implementation of the Media Act
- Public Service Media Review
- BBC Regulation

Implementation of the Media Act

The Media Act 2024 is the biggest change to the public service media framework in two decades. It makes changes to Ofcom's existing responsibilities as the UK's regulator of broadcast media, – including:

- Ensuring that the UK public service broadcasters ('PSB') can deliver obligations, such as quotas, wherever audiences expect them and not just on linear TV.
- Introducing new duties to secure prominence for PSB content and the accessibility of UK radio through voice assistants.
- Updating the regulatory framework for commercial radio to secure important local content.

Ofcom is currently in the process of implementing the various aspects of the Act, across the following key projects:

Updating PSB's regulatory requirements

- PSB quotas will now be set out in terms of absolute hours (previously percentages) and can be delivered through online players as well as linear channels. We are [currently consulting](#) on these proposals which primarily relate to Channels 3, 4 and 5, S4C, and where relevant, the BBC.
- Updates to PSB commissioning guidance to mean that the guidance applies to independent commissions for on-demand services and ensure that the PSBs' Codes of Practice are sufficiently transparent to independent producers.
- Updates to the requirements on PSBs to annually report on their activities and how they meet PSB objectives through Statements of Programme Policy (SoPPs).

Listed Events

- Changes the regime so that only PSBs can be "qualifying services".
- Broadens the scope of the regime to include any "television or television-like service" which can be used to show live coverage of listed events. This means that streaming services may need to apply to Ofcom for consent to show exclusive coverage of a listed event.

Prominence

- New prominence regime for PSB online players on connected TVs to ensure the PSBs are carried and made prominent.
- Connected TVs in scope defined as “platforms that enable people to select and access TV apps” – other devices (e.g. mobiles/gaming consoles) debated but not included.
- We will be recommending to the Secretary of State which platforms should be designated later this year – we have just published our [statement on the principles and methods](#) we will use to make these recommendations.

Channel 4

- Part 3 of the Act allows Channel 4 to produce its own programmes for the first time. Our role is to produce Guidance relating to the preparation of their statement of commissioning policy. We will consult on this guidance soon.

Video-on-demand

- Ofcom is required to write and implement a new VoD Code. Secretary of State will designate which services fall under scope after we report on state of the VoD market.
- New VOD Accessibility Code to make them accessible to disabled people.
- Ofcom required to review and report on the audience protection measures implemented by VoD providers.

Commercial Radio

- The Media Act removed previous requirements on commercial radio stations to broadcast certain types of content.
- However there are new local news and information requirements that we will shortly be consulting on.

Voice Assistants

- New duty on voice assistant radio players to ensure availability of UK radio stations.

PSM Review

Our review looks at how the provision of PSM content can be maintained and strengthened for the next decade and beyond. We will publish the findings of our review later in the year that will set out a range of options that will help maintain and strengthen PSM in the future.

In December, we published the first part of our review that looked back at PSM delivery between 2019 and 2023, which found the following:

PSBs face enormous challenges but are delivering for UK audiences

- Advertising revenues dropped £600m in real terms between 2018-23 while licence fee revenue was down £1.3bn in real terms between 2016 and 2023/24. Further declines in both income streams are expected and it is unclear whether digital income streams will be able to replace these.

- 67% adult audience satisfaction with PSB delivery (steady since 2021), which is mostly consistent across social groups.
- 71% of people watched PSBs on TV sets (down 13% since 2019) in 2023.
- Broadcasters face additional costs of reaching viewers on multiple platforms – while linear TV transmission costs have been reduced 23% since 2019, costs of BVoD provision has gone up 55%.

Audiences now have much greater choice of content

- 69% of households have at least one SVoD subscription, and Enders forecasts that by 2030 average daily viewing of VSP video will almost be equal to that of live broadcast TV.
 - Children at the forefront of viewing changes – 2019-23 saw a 44% drop in amount of broadcast TV each day, to 38 minutes.
 - 51% of 16-24s who watch YouTube report having watched a PSB's YouTube channel in the last year.

More important than ever that audiences can easily find quality, accurate, trusted news

- PSB news output reaches 72% of UK adults on weekly basis in 2025 (down 8% since 2019)
- 63% of viewers feel PSBs perform well in delivering 'trusted and accurate UK news'
- Time spent consuming news via intermediaries (e.g. social media or YouTube) accounts for 39% of daily news consumption, approximately 26 minutes.
 - Intermediaries and other competition means declining resources – PSBs news spend down 16% in real terms since 2018.

Evolving production sector is important for successful delivery of PSM content.

- PSBs accounted for 51% of commissioning revenue in 2023 (down from 65% in 2013) and international providers 39% (15% in 2013).

BBC Regulation

The BBC delivers to audiences through its Mission to inform, educate and entertain. It is also required to deliver its Public Purposes and, as set out under the Royal Charter, the BBC Board must set the BBC's strategy, budgets and creative remit. Ofcom is responsible for holding the BBC to account on behalf of audiences, using the tools set out in our Operating Framework. We do this in three ways:

- overseeing the BBC's performance in delivering its Mission and Public Purposes;
- protecting fair and effective competition; and
- regulating content standards in BBC programming.

Every year, as required by the BBC Charter and Agreement, we publish a report on the BBC's performance in these three areas, and how we have carried out our role.

Structure

- [Royal Charter](#): Set by Government. Sets out BBC's Object, Mission, and Public Purposes, and the Corporation's governance and regulator arrangements.
- [Framework Agreement](#): Agreement between the Government and the BBC. Further outlines the BBC's duties, and Ofcom's regulatory role. It was updated in May 2022. We await changes following the Mid Term Review (2024).
- [Operating Licence](#): Set by Ofcom, containing the regulatory conditions Ofcom deems appropriate for the BBC to fulfil its Mission and promote its Public Purposes.

We are responsible for ensuring the BBC meets its mission and public purposes; overseeing standards; and ensuring fair competition.

BBC Operating Licence

The BBC Operating Licence has a number of regulatory conditions that directly relate to its services in Scotland. These fall under Public Purpose 4 which is to "reflect, represent and serve the diverse communities of all of the UK's nations and regions, and, in doing so, support the creative economy across the United Kingdom." Some of the most relevant conditions are as follows:

- At least 8% of hours of/expenditure on BBC Network Programmes are made in Scotland (condition 4.18).
- Across TV, radio and online, the BBC must provide content of interest and relevance to audiences in Scotland, including a broad range of content which reflects Scotland's culture (condition 4.42).
- At least 290 hours on BBC One Scotland are allocated to news and current affairs programmes (Condition 4.46).
- At least 125 on the BBC Scotland channel are allocated to news in peak viewing time (Condition 4.47).
- BBC ALBA must provide content aimed at those learning the Gaelic language (Condition 4.48).
- A requirement to publish transparency information each year setting out the steps the BBC plans to take to provide content of interest and relevance to audiences in Scotland (Condition 4.67).

BBC Charter renewal

DCMS is yet to announce public timelines for **BBC Charter Review** or Terms of Reference.

- [On 29 November 2024 it announced plans to use the Charter Review to 'consider funding options to support the national broadcaster's long-term future'](#), and informed UK Parliament it would not progress the previous government's BBC Funding Model Review.

Ofcom has a duty to carry out and publish two or more detailed **Periodic Reviews** in the Charter period. Ofcom conducted its first [Periodic Review](#) in 2022. In our [Plan of Work 2025/26](#) Ofcom committed to deliver the next Periodic Review by Q4 2025/26.



Constitution, Europe, External Affairs and Culture Committee

BBC (River City and Dumbarton Studios)

29 May 2025

Background

On 18 March 2025, [BBC Scotland announced](#) that the final series of long-running drama series, River City, would be broadcast in Autumn 2026. River City is currently filmed at Dumbarton Studios, and the same press release also stated that the lease for the Dumbarton site will come to an end in September 2026.

On April 24, 2025, the announcement was [debated in the Chamber in a members' business debate on motion S6M-16978, in the name of Neil Bibby](#).

On May 15, 2025, representatives from the union Equity attended the Committee meeting to discuss the impact of the announcement on the creative industries in Scotland.

The BBC previously appeared before the Committee on [23 January, 2025, to discuss the Annual Report and Accounts from year 2023/24](#).

Announcement

The [announcement from the BBC](#) that River City will cease to be broadcast in Autumn 2026 stated that this was a decision taken to reflect “a significant change in audience behaviour away from long-running series and towards shorter runs.”

Alongside the announcement, the BBC committed to making new short-form drama in Scotland. The programming that was announced included three new series – Counsels, Grams and The Young Team – as well as future series of existing shows including Granite Harbour, Shetland and Vigil. The announcement suggested that this forms:

“part of the single biggest investment in drama from Scotland in the past decade, these new dramas - along with existing commissions - will create new opportunities across the independent sector. Total investment in BBC drama from Scotland over the next three years is expected to rise to over £95m cumulatively (2026-28).”

The three new series Counsels, Grams and The Young Team will be set in locations in Scotland. Respectively, they will be produced by [Balloon Entertainment](#), [World Productions](#), and [Synchronicity Films](#). Balloon Entertainment is based in London (there is a [Balloon Entertainment Scotland Ltd](#) registered at Companies House, but up to August 2024 this company appears to be ‘dormant’); World Productions is part of ITV Studios and is also based in London; Synchronicity Films is based in Glasgow.

During the [Committee session with the BBC on 23 January](#), the Committee explored Ofcom’s qualifying criteria for a programme to be considered Scottish in the context of the classification of Traitors. Ofcom has three criteria in this regard, and they are described elsewhere in Members papers this week. Hayley Valentine, Director of BBC Scotland, [told the Committee](#):

“I would like us to get to the point where everything that reaches our network TV quotas qualifies on at least two of the criteria, which would mean that money is being spent in the Scottish economy and people who live in Scotland are being paid by the sector.”

Tim Davie, the Director General, said that his “ambition is to grow production in Scotland.” In an email to MSPs, the BBC stated that it “recognises the important role of public service broadcasting in providing pathways for development” and that “new returning drama series will have training front and centre of the production process, and we will work with third parties to ensure Scotland’s TV drama sector has writing and production pathways in place across our shows”. The [announcement from the BBC](#) in relation to the cancellation of River City said

“The BBC will also work with industry partners on a new talent training plan in Scotland. A new framework for training will build on River City’s successful training academy and the ongoing work on other series to elevate individuals in to senior creative roles as well as supporting and developing production crews. Further details will be announced in the autumn.”

There has been commentary on the role the studio lease in Dumbarton has played in the decision to cancel River City. In the email to MSPs, the BBC said, “the decision to end River City is an editorial one driven by a declining audience; the BBC’s lease for the Dumbarton site comes to an end in autumn 2026 and the BBC has no need to continue with its lease after the completion of filming of River City.” The BBC also quoted BARB viewing figures; it said, “the average audience for River City across 2024 was 200,000 in Scotland (210,000 in UK)” and the BBC noted that this was much lower than other Scottish dramas, such as Granite Harbour and Shetland. The BBC’s email stated—

“Audience performance is not connected to the skills, creativity and talent of the team working on River City. Viewing habits have changed hugely in the

last decade, particularly in drama, with increasing demand for more varied high-end returning dramas rather than year-round series. In response to this significant change in audience behaviour, away from long-running series and towards shorter runs, and to remain competitive in the marketplace, the BBC has decided to invest in an increased number of new shorter-running dramas produced in and reflective of Scotland - as opposed to directing investment into just one programme.”

Member’s Debate

On April 24, 2025, the announcement was the topic of a [debate in the Chamber](#). The members’ business debate was on motion [S6M-16978](#), in the name of Neil Bibby.

The topics discussed by the MSPs who participated in the debate centred on the potential impact of the decision on the wider Scottish production landscape.

Concerns raised included:

- loss of jobs
- training and apprenticeship opportunities at Dumbarton Studios
- the fall in the number of Scottish drama hours on BBC channels
- and the potential fall in BBC funding spent in Scotland.

The conclusion reached in the majority of the speeches was that the decision to end production of River City and close Dumbarton Studios will have a negative impact on the Scottish creative sector.

The Cabinet Secretary for Constitution, External Affairs and Culture, Angus Robertson, responded to the debate by stating that:

“It is more than regrettable that the BBC has taken the decision that it has regarding the only production of this kind in Scotland, and I am deeply disappointed that we continue to see a worrying trend in decision making that runs counter to the BBC’s commitment to invest in the nations and to improve representation...

“The BBC is accountable to Scottish audiences, and it should be delivering a service that meets the needs in Scotland. When I recently met the BBC Scotland director, I was clear that investment, skills and job opportunities must remain in Scotland and that we expect to see those increase...

“Having sustainable jobs and production businesses that are based in Scotland is essential to maintaining and developing a strong, sustainable and growing Scottish screen sector, which the Scottish Government is committed to growing to reach £1 billion in gross value added by 2030.”

Committee session with Equity

On 15 May 2025 the Committee invited representatives from Equity to attend the meeting to discuss the impact of the announced closure of the Dumbarton Studios on the sector in Scotland. The discussion focussed on the potential loss of the training academy based within the River City production, as well as the importance of Dumbarton Studios as a core part of the creative industries infrastructure in Scotland. The summary below was written prior to the publication of the Official Report for the meeting.

Infrastructure and skills

The impact on skills in Scotland was the focus of much of the conversation during the session. Lynda Rooke, President, Equity described soaps as a “training ground” that allowed “people from marginalised communities in particular to enter the industry.”

Frank Gallagher, an actor and member of the River City cast explained in detail how the training academy supports young people in Scotland to gain industry skills while working on River City. He gave examples of individuals who had started as trainees and now hold senior positions within the production. He told the Committee that “there’s nowhere else like it in Scotland,” and it would be “very difficult to replace.”

Paul Fleming, General Secretary, Equity compared the production of a long-running drama such as River City with how shorter drama productions often work. He told the Committee that River City employs Scottish talent at all levels of the production, from security staff and the make-up department to onscreen talent. He claimed that in comparison, BBC Scotland funded short dramas, even if they are filmed in Scotland, often employ crew from elsewhere in the UK. He argued that such dramas do not provide the same base and training ground, or employment opportunities, for locally based talent. He also suggested that without core production infrastructure based in Scotland, there would be no way into the industry for young people unless they left Scotland.

Paul Fleming also expressed the opinion that there were other potential models for delivering the same level of infrastructure and skills in Scotland as the current River City production provides, but that he had not seen any evidence that the BBC had a substantial plan to deliver this. He said that the “real question is what value is [BBC production] delivering to Scotland and what value is it delivering to our members?”

He also discussed what it means for BBC Scotland to withdraw from Dumbarton Studios, asking the Committee, what is the BBC’s “commitment to cultural infrastructure in Scotland?” There was a discussion about the BBC’s responsibility to support cultural infrastructure and how they may be held to account for this responsibility.

Representation

There was also a thread throughout the discussion that related to on-screen representation and inclusion.

Frank Gallagher expressed this by describing the wide demographics of the River City audience, including people of every age group. He expressed the view that short-form drama is often targeted at the streaming platforms, which tends to be viewed by a younger demographic.

Mr Gallagher also stated that closing production on River City represented the loss of a representative voice on broadcast television. He told the Committee that “if you take it away you lose a part of your own voice,” and “this is our voice we’re talking about here. This is our culture we are talking about here.”

The discussion also suggested that a long form soap is potentially an avenue for wider diversity and inclusion opportunities than other formats. Lynda Rooke suggested it is an important vehicle for working class stories and representation, as well as an avenue for future talent to have an opportunity to enter the industry.

Similar arguments were made to the Committee at their meeting on [February 23 2023](#), when they heard from a range of stakeholders arguing against changes to the Radio Scotland programming schedule. At that time three programmes that shared jazz, classical music and bagpiping genres on the radio had been cancelled. The stakeholders told the Committee about the importance of the programmes as avenues for new, young Scottish talent to enter the industry and to get their first step in their future musical careers.

Article 14 of the current BBC charter required the BBC to “ensure that its output and services overall provide a duly accurate and authentic portrayal and representation of the diverse communities of the whole of the United Kingdom.”

BBC Strategy and consultation

During the discussion, the perceived lack of consultation and strategy from the BBC was also discussed by the panel.

Frank Gallagher said that there had been no consultation with Equity or with the current production crew and actors before a decision was announced. He talked about the news being announced for the first time in the canteen one lunchtime.

Paul Fleming also noted that there has been a lack of consultation on any potential BBC strategy for the future of all the soaps it currently produces. He suggested that “there is a high handedness where they suggest that the consultation wouldn’t have changed anything because of viewer habits and the behaviour of the landlord.” However, he went on to describe the changing production methods of other soaps such as Hollyoaks, that are experimenting with new ways to create and share content. He expressed frustration that the BBC had not spent time reviewing River City and looking at different ways production could continue that met changing viewer habits.

He also told the Committee that “part of the function of the BBC is to provide stable high quality employment to artists,” and that this commitment cannot be met by producing a small number of short-form dramas.

BBC policies

The BBC Across the UK

In March 2021, the BBC published [The BBC Across the UK](#). This set the BBC's plans to move more of its services and output away from London and the South-East. It said—

“Our ‘Across the UK’ plan will transform the BBC by making a decisive shift in its footprint. Over the next six years we will recreate the BBC as a genuinely UK-wide organisation with a much stronger presence across the length and breadth of the country. This shift will move the creative and journalistic centre of the BBC away from London to a much more distributed model that moves not just people, but power and decision-making to the UK’s Nations and regions. ... Taken together, these proposals mean the BBC will cumulatively spend at least an extra £700m outside London by 2027/28, generating an additional economic benefit to those parts of the UK of around £850m.”

In Scotland, the BBC has made a range of commitments to improve representation and investment, and to develop new talent.

- The BBC will increase its operations in Glasgow, physically expanding its BBC Studios bases as well as moving the Technology reporting team there.
- The BBC will double the number of nations’ co-commissions, including those from Scotland, which appear on UK-wide channels.
- Over the next three years more than a hundred drama and comedy titles will reflect the lives and communities of audiences outside London, of which at least 20 will portray Scotland, Wales or Northern Ireland.
- As well as renewing its partnership with Screen Scotland, the BBC has committed to modernising the BBC/MG ALBA partnership and developing BBC ALBA and BBC Radio nan Gàidheal services to increase their digital impact.

Changing landscape

The market conditions for broadcasters have changed significantly in the past several years. Technological change has led to more digital platforms including the rise of subscription video on demand, smart speakers, podcasts and so on. This means that there is increased competition for audiences.

In March 2024 the BBC published ‘[A BBC for the future](#),’ setting out it intends to answer:

“What is the BBC’s role today, and in the future? More than 100 years on from its foundation, what can it do for the UK to respond to the most pressing needs of our democracy, our creative economy and our society?”

It sets out three priorities for the future of the organisation:

- Pursue truth with no agenda by reporting fearlessly and fairly
- Back the best British storytelling by investing in homegrown talent and creativity
- Bring people together by connecting everyone to unmissable content.

Some of the possible impacts of this future planning in relation to Scotland, as set out in the report, are:

- tailoring the BBC iPlayer homepage later this year to provide greater prominence for stories that resonate most in the devolved nations
- reshaping the news output in Scotland
- making more content across the UK, with over 60% of network TV and 50% of radio and music spend outside London, and around 20% of TV spend in Scotland, Wales and Northern Ireland.

Recent Tim Davie Speech

On [14 May 2025, Director-General of the BBC, Tim Davie, gave a speech](#) on the future of the BBC. The focus of the speech was on the need to build trust and fight dis-information.

During the speech he discussed five areas of focus for:

“our central task of creating outstanding homegrown content and services but also support the wider challenge of building trust.”

Mr Davie discussed the need to invest in every part of the UK, he committed to work on:

“Helping to grow belief and trust that whoever you are whatever your background and wherever you live you can fulfil your potential.

“Ensuring that the next generation of comedy writers, dramatists, entertainers, producers, engineers are grown in the UK and build value for the UK.

“All of this helps to build a thriving creative industries sector not only growing hundreds of commercial businesses, millions of jobs, but also building strong partnerships with our cultural institutions, like here in the Lowry.”

Laura Haley
SPICe Research
20 May 2025

Note: Committee briefing papers are provided by SPICe for the use of Scottish Parliament committees and clerking staff. They provide focused information or respond

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to specific questions or areas of interest to committees and are not intended to offer comprehensive coverage of a subject area.

The Scottish Parliament, Edinburgh, EH99 1SP www.parliament.scot

River City Briefing Note from BBC ScotlandAudiences **

- The decision about *River City* is based on viewing habits in Scotland substantially changing
- *River City* launched on BBC One Scotland in 2002 with an audience of 700,000
- By last year, the average audience for *River City* across 2024 was 200,000 in Scotland (210,000 in UK)
- The only time *River City* reached an audience of over 500,000 for a consistent period was Q1 (Quarter One) 2008; the last time any individual episode reached over 500,000 viewers was over a decade ago, in March 2014, although the average audience across 2014 was 409,000
- For comparison audiences for other Scottish dramas include (in order of broadcast date):
 - *Granite Harbour* S1: 453,000 in Scotland (3.8 million in UK)
 - *Vigil* S2: 710,000 in Scotland (7.9 million in UK)
 - *Nightsleeper*: 708,000 (7 million in UK)
 - *Shetland* S9: 791,000 in Scotland (6.5 million in UK)
- Audience performance is not connected to the skills, creativity and talent of the team working on *River City*. Viewing habits have changed hugely in the last decade, particularly in drama, with increasing demand for more varied high-end returning dramas rather than year-round series.
- In response to this significant change in audience behaviour, away from long-running series and towards shorter runs, and to remain competitive in the marketplace, the BBC has decided to invest in an increased number of new shorter-running dramas produced in and reflective of Scotland - as opposed to directing investment into just one programme.

New drama investment

- Total investment in BBC drama from Scotland over the next three years is expected to rise to c£95 million cumulatively (2026-28).
- Our new dramas are written by Scottish writers, they will employ a wide range of Scottish-based talent and will be made by producers with bases in Scotland.
- **New drama series:**
 - Legal drama *Counsels* (8eps x 60') set in and around Glasgow
 - *Grams* (6eps x 60') is a dark comic thriller set in Springburn, Glasgow
 - *The Young Team* (6eps x 60') based on award-winning novel set and filmed in North Lanarkshire
- **Returning dramas:**
 - *Granite Harbour* will return for a third series
 - *Shetland* is filming its tenth series
 - *Vigil* will return for a third series

- **Other dramas include:**
 - Richard Gadd's new series *Half Man* has started filming in Scotland
 - Psychological thriller *The Ridge*, filming in both Scotland and New Zealand, will broadcast later this year.
 - Family crime drama *Mint* is currently filming in Scotland.

Training

- The BBC recognises the important role of public service broadcasting in providing pathways for development.
- *River City* training opportunities will remain active for another year until we cease production in 2026.
- The BBC will work with industry partners on a training framework in Scotland.
- New returning drama series will have training front and centre of the production process, and we will work with third parties to ensure Scotland's TV drama sector has writing and production pathways in place across our shows.
- The opportunity to work on a varied slate of scripted content will bring benefits to both entry level and established talent.
- A wider range of content and working on scripted series of a scale more reflective of the current market to benefit the training of the sector as a whole and relevant to the future work which will be available in the drama sector.

River City

- *River City* currently has a multi-series format, showing three distinct series a year filmed in three monthly windows and airs between October-December, February-May and June-September with breaks in between.
- *River City* is filmed on location in the BBC Dumbarton Studios (both internal and external locations); the site is not owned by the BBC.
- The decision to end *River City* is an editorial one driven by a declining audience; the BBC's lease for the Dumbarton site comes to an end in autumn 2026 and the BBC has no need to continue with its lease after the completion of filming of *River City*.
- Plans are underway to ensure *River City* goes out on a high next year, celebrating the show's legacy.

** Audience source Barb - the industry-standard for audience measurement data. Barb measurement methodology: 2002 BARB As Broadcast; 2024 BARB As Viewed 4-screens; all data for Scotland (unless given as UK).