



RADIO NEW ZEALAND LIMITED

BRIEFING TO THE INCOMING MINISTERS

October 2017

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ABOUT RADIO NEW ZEALAND

Radio New Zealand (RNZ) is New Zealand's only commercial-free public broadcaster. At a time of media sector upheaval, we provide independent, credible and comprehensive news, current affairs and entertainment and are a vital conduit for information for New Zealand and the Pacific in times of crisis.

Under our Charter, RNZ plays an essential role in ensuring New Zealand is a connected and informed nation. We champion New Zealand's arts and culture. We are multimedia – delivering content on platforms as demanded by audiences.

The importance of having public service media is growing as commercial media outlets continue to face the major challenge of sustaining their investment in New Zealand content in the face of the growing influence from overseas owned global competitors.

RNZ is an efficient and effective means to help address these gaps and create more public value from the Government's investment in New Zealand content.

We have a track record of success to build on:

- ❖ RNZ is a highly valued public service brand with a proven ability to engage effectively with large audiences while meeting our Charter obligations.
- ❖ Our news and current affairs, independent of commercial and partisan influences, remain highly trusted at a time of fake news and click bait.
- ❖ The transformation of RNZ from a radio broadcaster to a multimedia outlet has been successful.
- ❖ As a commercial-free outlet we are not adversely affected by the decline in advertising revenues that is besetting other media organisations.
- ❖ We are efficient with low overheads and we own the rights over the vast majority of our content.
- ❖ We support other media outlets by sharing our content and talent.
- ❖ We have a stable of highly-trusted and credible broadcasters, journalists and programme makers.

RNZ is a Crown owned entity and its function and operations are primarily governed by the Radio New Zealand Act 1995. Legislation has recently been reviewed and the Radio New Zealand Amendment Act has applied since April 2016. The Act made some changes to the Radio New Zealand Charter which sets out Radio New Zealand's purpose, function and operating principles.

RADIO NEW ZEALAND CHARTER

The key elements of the Charter are:

Purpose

- (1) As an independent public service broadcaster, the public radio company's purpose is to serve the public interest.
- (2) Freedom of thought and expression are foundations of democratic society and the public radio company as a public service broadcaster plays an essential role in exercising these freedoms.

- (3) The public radio company fosters a sense of national identity by contributing to tolerance and understanding, reflecting and promoting ethnic, cultural, and artistic diversity and expression.
- (4) The public radio company provides reliable, independent, and freely accessible news and information.

Delivery

- (5) In achieving its purpose, the public radio company must endeavour to provide services of the highest quality, which—
 - (a) are predominantly and distinctively of New Zealand:
 - (b) inform, entertain, and enlighten the people of New Zealand:
 - (c) are challenging, innovative, and engaging:
 - (d) foster critical thought, and informed and wide-ranging debate:
 - (e) stimulate, support, and reflect the diversity of cultural expression, including drama, comedy, literature, and the performing arts:
 - (f) stimulate, support, and reflect a wide range of music, including New Zealand composition and performance:
 - (g) reflect New Zealand's cultural identity, including Māori language and culture:
 - (h) provide awareness of the world and of New Zealand's place in it:
 - (i) provide comprehensive, independent, accurate, impartial, and balanced regional, national, and international news and current affairs:
 - (j) provide programmes which balance special interest with those of wide appeal, recognising the interests of all age groups:
 - (k) contribute towards intellectual and spiritual development:
 - (l) include an international service to the South Pacific in both English and Pacific languages:
 - (m) take account of services provided by other broadcasters:
 - (n) take advantage of the most effective means of delivery:
 - (o) preserve and archive broadcasting material of historical interest.

Principles of Operation

- (1) The public radio company must, in fulfilling its Charter, exhibit a sense of social responsibility by—
 - (a) having regard to the interests of the community in which it operates; and

- (b) endeavouring to accommodate or encourage those interests when able to do so.
- (2) The public radio company must, in fulfilling its Charter, ensure that it is not influenced by the commercial interests of other parties.
- (3) The public radio company must, in fulfilling its Charter, ensure that it operates in a financially responsible manner and, for this purpose, that it—
 - (a) prudently manages its assets and liabilities; and
 - (b) endeavours to ensure—
 - (i) its long-term financial viability; and
 - (ii) that it acts as a successful going concern.

LIFELINE UTILITY

Radio New Zealand (RNZ) is also a designated Civil Defence Lifeline Utility in accordance with the Civil Defence Emergency Management Act 2002. This places extra social and legislative responsibilities on RNZ in the event of a Civil Defence emergency.

RNZ has a statutory duty to ensure that it can function during an emergency and it is required to maintain appropriate systems for the dissemination of emergency-related information.

GOVERNANCE

Radio New Zealand's Shareholding Ministers, the Minister Responsible for Radio New Zealand (RNZ) and the Minister of Finance, appoint a governing board of directors.

The Radio New Zealand constitution sets the size of the Board at a minimum of two and a maximum of nine directors.

The current Governors and their respective terms are as follows;

Name	Date first appointed	Date re-appointed	End of Term
Mr Richard Griffin Chairman	17 May 2010	1 May 2016	30 April 2018
Ms Deborah (Jane) Taylor Deputy Chair and Chair of Audit Committee	1 May 2011	1 June 2016	30 April 2019
Ms Melissa Clark-Reynolds	1 May 2014	1 May 2017	30 April 2020
Mr Rodger Finlay	1 January 2016		30 April 2018
Mr Bill Francis	1 January 2016		30 April 2019
Mr Graham Pryor	1 July 2016		30 April 2019
Mr Michael O'Donnell	1 September 2017		31 August 2018

CHIEF EXECUTIVE

Paul Thompson – appointed 9 September 2013

FUNDING

RNZ receives a total of \$38.545M in primary Government funding per annum as follows:

a.	From New Zealand on Air	\$35.356M	For achievement of Charter objectives. Increased by \$2.84M in year commencing 1 July 2017.
b.	From Ministry for Culture & Heritage	\$1.900M	For provision of a radio service to the southern Pacific Islands region.
c.	From Parliamentary Services	\$1.289M	For provision of AM radio transmission services for coverage of parliamentary proceedings.

RNZ also receives additional and occasional short-term funding from other Government agencies for specific programmes and projects.

Under its Charter RNZ's services must be commercial free and Government funding provides circa 95% of RNZ's total annual income.

OUR SERVICES

RNZ's current portfolio includes the following individual branded services:

A. RNZ NATIONAL	B. RNZ CONCERT	C. RNZ PACIFIC (PREV. RNZ INTERNATIONAL)
RNZ National is a nationwide network providing news, current affairs, feature documentaries and entertainment programmes, including music programmes featuring both New Zealand and international artists. Many of the quality programmes featured on RNZ National are not available on commercial radio because they are not considered commercially viable.	RNZ Concert brings fine music in stereo to all New Zealanders, through a network of FM transmitters and digital satellite. Musical, dramatic and performing arts comprise the core of RNZ Concert's broadcasts, with a repertoire featuring mainly classical music but also including jazz and special interest music.	RNZ provides an international radio and online service to the Pacific. This service broadcasts innovative, comprehensive and independent news and programming of interest to the Pacific region. We aim to encourage an awareness and understanding of New Zealand policies on regional issues of concern, foreign relations, development assistance, immigration, human rights, economic developments, the environment and trade opportunities. RNZ International provides a reliable account of Pacific and New Zealand affairs for relay and use by broadcasters, listeners and online users within the Pacific and beyond. It provides an essential source of information in the event of natural disasters or breakdowns in local communication services.
D. RNZ PARLIAMENTARY RADIO AND PROCEEDINGS	E. RNZ.CO.NZ	F. THE WIRELESS
Follow Parliament live, when the House is sitting, through the AM Network or audio live stream online.	The website rnz.co.nz provides a comprehensive portal to its content, allowing users access to live streaming services for RNZ National, RNZ Concert and RNZ International. In addition users have access to comprehensive up to the minute news and analysis as well as access to more than 230,000 on-demand audio items (over 37,00 hours) from RNZ's vast online collection of back catalogue programming and web only collections.	The Wireless is a youth targeted website which is upfront, in-depth and in tune, aiming to produce inspiring, insightful and entertaining stories for New Zealanders who have grown up in the digital age. The site is updated with new content every weekday. The site provides multi format content (text, audio and video) and encourages user interaction through sharing of content across other social media outlets and through commentary on articles posted.

Each of these services has an existing format and an established audience. However, there is also significant cross-fertilisation and sharing of content, staff and other resources between services, as we aim to achieve the most efficient and effective use of our funding.

Delivery and Access to Our Services

Access to our services is available through a range of broadcasting platforms and devices.

These are currently:

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- ▶ AM radio networks;
 - ▶ FM radio networks;
 - ▶ Satellite Television – Sky TV, Freeview, Free-to-Air;
 - ▶ Digital Terrestrial Television - Free-to-Air, Freeview;
 - ▶ RNZ Websites (live streaming, on-demand, podcasts):
 - radionz.co.nz; and
 - thewireless.co.nz;
 - ▶ Mobile - iPhone and Android applications, online access;
 - ▶ Digital Shortwave (Pacific region);
 - ▶ Satellite radio (Pacific region); and
 - ▶ Social media - eg. Facebook, Youtube
-

The migration of audiences to new technologies will, over time, result in a decline in audiences solely using older traditional equipment. As we introduce new opportunities for audiences to access our programming and content, existing delivery platforms will also be reviewed to ensure these are still viable and are the most efficient and effective use of resources.

RNZ also shares its content with a number of strategic partners, for example MSN, NZME, Stuff, Spotify, Les Mills, Face TV, Pacific Media Network and iwi radio stations.

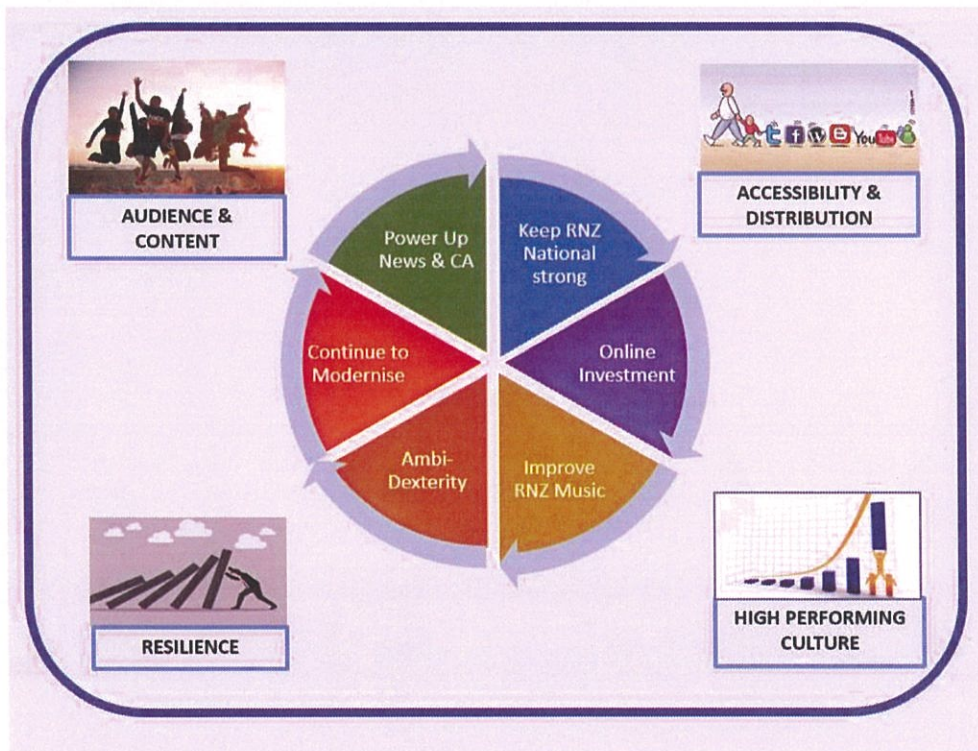
This third party distribution supports other service providers and enhances the overall reach of RNZ. It is expected that this list will be added to and/or enhanced frequently over the course of the next five years, notably with new online services and partnerships with other content providers to increase our audience reach.

CURRENT PERFORMANCE

The last three years has been a period of considerable change at RNZ.

- After several years of declining/static radio audiences, average combined weekly radio audiences have increased 42% from 484,000 in late 2014 to 691,000 October 2017.
- Monthly users of RNZ websites have increased 316% from 478,000 to 1,990,000.
- This audience growth has been further enhanced as we have made our content available via an increasing number of third partnership arrangements including MSN, stuff, Spotify, iHeart, Bauer, Pacific Media Network, Iwi radio. These new access points have made our content available for completely new audiences over and above the RNZ owned and controlled platforms, at little or no cost to RNZ.
- Financially we have re-engineered the business, first by adapting to 8 years of static funding by reducing the ongoing cost structure by circa \$3M per annum to free up budget for modernisation and new multi-media initiatives. This saw a return to our target of breakeven for the 2016/17 year after a number of years of deficit.
- We brought focus back to our core-business of media and looked to reduce our investment in infrastructure, which included the sale of an Auckland commercial property and return the proceeds to the Crown in return for a funding increase.
- We secured a \$2.84M p.a baseline funding increase for the current year by putting our emphasis on future-focussed growth, rather than historical problems.
- We are finally able to develop a capital expenditure plan that will see us upgrade all our key technology over the next 3-5 years to become a fully modern digital efficient multi-media operation.

Our plans for the next three years are outlined in more detail our 2017 – 2020 Statement of Intent and 2017 – 2020 Statement of Performance Expectations, but our four key strategic objectives and 6 key budget priorities are as follows:



PRIORITIES FOR NEXT THREE YEARS

POWER UP NEWS & CURRENT AFFAIRS

- Comprehensive, authoritative and independent News and Current Affairs is our core offering and the primary driver of audiences to RNZ, for both our own on-air and online services and also those from third party services.
- It is the one area where we have significant competencies and advantages which differentiate us from other news providers in New Zealand.
- The developments within the commercial media sector accentuate both the need and the opportunity for RNZ to continue to emphasise its multimedia news and current affairs programming to both retain existing audiences AND reach new and more diverse target audiences.

KEEP RNZ NATIONAL STRONG

- RNZ National is consistently New Zealand's most listened to radio station and also still provides the base from which much of our overall audience from other platforms is leveraged.
- RNZ National's continued success is still a critical component for the achievement of our charter and audience objectives.
- However, RNZ National cannot remain static and must continually look to evolve, adapt and refresh its programming, to reflect the changes in the media landscape and in NZ's population mix
- RNZ National is currently particularly strong with older listeners and those in the Wellington region, but is under-indexed with non-European ethnicities and in the Auckland region. These are the projected growth areas within NZ's overall population mix and where RNZ National should look to for new audiences.

CONTINUED ONLINE INVESTMENT

- Reflecting the impact of changing audience habits and preferences, online is where the significant future growth will come from, especially with younger audiences.
- There has already been exponential growth in the online audience over the last two years, and the size of that online audience now matches that of the radio audience, although there is currently a significant level of overlap.
- RNZ's online offering has now moved well past the point of just being a portal for existing RNZ radio listeners to access the current content in other ways and at other times.
- By the end of 2020, online audiences are expected to contribute to 50% of RNZ's overall audience as well as "sharing" another 34% with radio.
- To meet this growth target RNZ must continue to invest in its online products and platforms to attract new audiences, optimise the user experience, and make the content as widely accessible as possible.

IMPROVE RNZ MUSIC

- To achieve our audience targets and optimise charter performance we need to optimise the mix of our services and use these cost-effectively to deliver different services to different sectors of the population, not just deliver more to the same audience.
- Different age groups, ethnicities, cultures, religions and genre preferences all provide opportunities for RNZ to connect with new audiences through music.
- The plans for 2017/18 include a review, to explore options and alternatives to see if we can improve RNZ Music's performance and contribution to RNZ's over-riding statutory and strategic objectives.
- The intent of the review is to consider formats and content for RNZ Music that may:
 - improve the audience diversity;

- improve the contribution to RNZ's total reach;
- be a more cost effective service;
- be more NZ-centric with its programming.

AMBI-DEXTERITY

- To fully reflect New Zealand in the 21st century, RNZ needs to be as strong in Auckland as it is in Wellington.
- Auckland has already been identified as “the big opportunity” for RNZ audience growth, not only in overall numbers due to its population size, but also in its diversity, notably the large Maori, Pasifika and Asian communities, which are under-represented in our current audience statistics.
- Auckland also has a vital role to play in our business continuity planning. A new objective is for Auckland to be able to maintain broadcasting (at least of RNZ National), publishing to the web, news gathering and presenting capabilities, and critical support functions, completely independently of Wellington if necessary and for as long as necessary.
- This will require more staff, equipment, resources and capability being established and maintained in Auckland, and over time this could see a potential shift of up to 30 - 50 positions from Wellington to Auckland.
- This shift will be achieved from a mix of organic growth with new staff appointments being directed towards Auckland, and also more targeted re-location of positions in some specific identified areas where there are other benefits of moving parts of those operations to Auckland.
- This will also include back office support functions such as HR, IT, Finance, Payroll, Admin., etc.. so that the Auckland office can provide complete continuity of service should anything adversely affect the availability of the Wellington premises and staff.

CONTINUED MODERNISATION

- RNZ still has a way to go on its “modernisation & transformation” journey to make RNZ an agile, efficient, multi-media company.
- As well as new technical equipment that is directly related to our content and services, there are also many support areas in the “back-office” that could benefit from new systems, processes, technology, etc..
- Specific items related to modernisation in the capital expenditure planning include :
 - increased video production capability in the regional offices;
 - enhanced mobile, live multi-media broadcast capability;
 - new equipment & systems for HR, finance, etc.. (cloud based where possible);
 - organisational culture change initiatives;
 - Wellington premise refurbishment & re-stack;
 - ambidexterity & resilience requirements in Auckland & Wellington;
 - improve network systems between locations.

FOCUS PROJECT – RNZ MĀORI STRATEGY

RNZ has implemented a new, long-term strategy that represents a commitment to creating high-quality Māori content, supporting Te Reo Māori and fostering Māori journalism.

While there will still always be Māori-specific broadcast and online content, RNZ's strategy puts its emphasis on the integration and normalising of te reo across all its platforms.

Some of the initiatives include:

- Te Reo Māori being heard in almost every RNZ news bulletin – reporters have chosen to sign off in te reo to underline their desire to share the language with as many New Zealanders as possible.
- On-air staff training in te reo to develop their knowledge and ability to speak and in time this education programme will be made available to all RNZ employees.
- Māori staff taking the lead in live programming on days of national significance (eg. Wāitangi, Anzac).
- RNZ is also seeking to measure the effectiveness of its Māori initiatives and is in discussions with Te Taura Whiri (the Māori Language Commission) to undertake research with RNZ to gauge the public responses to RNZ's use of te reo.
- RNZ's website continues to provide a significant platform to promote Māori language, culture and stories.
- A partnership with Te Whakaruruhau O Nga Reo Irirangi will also see RNZ in future offering full te reo bulletins on rnz.co.nz.
- Nga Taonga Sound and Vision has been working for the past year to identify RNZ archival content in Te Reo that can be released online to be enjoyed by new audiences. Two series, "Te Reo o Te Māori" and "Te Reo o Te Pipiwharau" will become available through ngataonga.org.nz and rnz.co.nz from September 2017.
- The March 2017 launch of RNZ's Henare te Ua Māori Journalism Internship presents an exciting opportunity for young Māori graduate keen to develop their skills as a reporter.

MAJOR POLICY ISSUES PENDING

SUCCESSION FOR BOARD OF GOVERNORS

Of RNZ's total current complement of seven Governors, the terms of two come to an end within the next 6 months and a further 4 within the next 18 months. Succession planning for replacement or renewal of these Governors to the Board will be important for RNZ as it continues with its plans for change and growth. Ensuring the board maintains and further develops the capabilities and expertise that enhance RNZ's strategic development will be critical.

AM BROADCASTING

RNZ currently owns a significant property portfolio and other related equipment required to support its AM radio services. However, with the advent of new technologies, eg. FM radio, satellite TV, digital terrestrial TV, mobile and online delivery options, the use of AM radio has declined significantly over the last 20 – 30 years.

While the AM audience is declining, the cost of maintenance and upkeep of the property, buildings and AM equipment is increasing. This requires RNZ to divert budget to this ageing network at the expense of more future-focussed initiatives.

Some of the property used for the AM transmission sites (esp. in Auckland and Wellington) are large strategically placed sites that may now have other better uses (notably housing).

These factors have reached the point where RNZ considers it is now time to work with stakeholders to develop plans to, either partially or completely, exit AM broadcasting over time. RNZ's strategy is to divest itself of AM transmission assets at the optimal time and in a manner that effectively manages audience and market disruption while creating a more financially-sustainable operation. There are a range of audience, financial, contractual, spectrum, property, and lifeline utility issues that will need to be addressed in the course of developing these plans.

RNZ's future is as a media organisation centred on audiences, talent, content and services, not as an owner of infrastructure.

RNZ'S FUTURE PATH

There are two broad options for the development of RNZ into a stronger public service:

RNZ (Current Path)	RNZ (GROWTH OPTION)
<ul style="list-style-type: none"> ➤ In transition period from traditional radio broadcaster to a multi-media service. ➤ Recent online growth has been significant and is expected to grow steadily. ➤ Current audience approx. 17% of population (800,000 average per week) but still room for improvement in diversity (ethnicity, age, geographic, etc.) 	<ul style="list-style-type: none"> ➤ RNZ is a fully-fledged multi-media service for all New Zealanders. ➤ Any time, anywhere, any device ➤ RNZ is the home of NZ content, in all its forms and across all platforms. ➤ 40% - 50% of NZers regularly use RNZ services.

<p>➤ Successful budget bid in 2017 after 8 years of static funding. This will be adequate for the next 3 years, but challenges of static funding will re-surface if it remains at this level for much beyond 2020.</p>	
RNZ (Current Path)	RNZ (GROWTH OPTION)
<p>Services RNZ still largely defined by its traditional services and delivery platforms.</p> <p>Radio - 4 x live radio services</p> <ul style="list-style-type: none"> • RNZ National (AM + FM), • RNZ Concert (FM only) • RNZI (Shortwave Pacific region only), • Parliament (AM only) <p>Online – 2 x websites</p> <ul style="list-style-type: none"> • Audio, text, audio-visual • rnz.co.nz for live streaming of National & Concert, on demand programme content, podcasts. • The Wireless – youth orientated content <p>Television - Freeview & Sky channels</p> <ul style="list-style-type: none"> • 24 /7 audio only for RNZ National & RNZ Concert • Checkpoint and occasional special events include video <p>Third parties – Content partnerships:</p> <ul style="list-style-type: none"> • Online News content – eg. MSN, stuff, Bauer • Radio News – Iwi radio, Pacific Media network • Podcasts & audio-visual content – eg. Face TV (Checkpoint), TV3 (9th Floor) 	<p>Services RNZ is defined by its unique NZ content and audience diversity.</p> <p>News & Current Affairs – RNZ is the trusted source of independent and comprehensive News & Current Affairs for all New Zealanders.</p> <ul style="list-style-type: none"> • Full range of international, national, local & regional news. • Customised news services for specific audiences. • Multiple services available on all platforms - radio, online, television, social media, third party content sharing. • Provide a news service for use by other media. <p>Music & Entertainment – RNZ produces and publishes unique New Zealand music and entertainment not provided by commercial media services.</p> <ul style="list-style-type: none"> • High levels of local NZ content • Range of streamed online services - featuring multiple music genres • Offer recording, producing and broadcasting opportunities for NZ music talent to “break through”. <p>Ethnic & Cultural – RNZ to embrace and reflect New Zealand’s increasing ethnic and cultural diversity and provide services tailored to each of these groups.</p> <ul style="list-style-type: none"> • Enhanced content for Maori, Pasifika, Asian and other new ethnic sectors. • RNZ Pacific (formerly RNZ International) to provide content for New Zealand based audiences, not just broadcast to the pacific. • Multiple language services available online. • Access radio online for niche audiences <p>Youth - RNZ attracts more younger New Zealanders.</p> <ul style="list-style-type: none"> • Online music services featuring genres with greater youth appeal. • Customised news services for younger audiences. • Content distributed via social media platforms.

RNZ (Current Path)	RNZ (GROWTH OPTION)
<p>AUDIENCES</p> <ul style="list-style-type: none"> • Grown to 850,000 (17%) New Zealanders per week, from all access points, excluding social media (too difficult to measure). 	<p>AUDIENCES</p> <ul style="list-style-type: none"> • With greater reach across more diverse audiences, other ethnic groups, younger New Zealanders,

<ul style="list-style-type: none"> • Target is 1.2m by 2022, but likely to plateau. • Most of growth will come from new online audiences. 	<ul style="list-style-type: none"> • Range of new services (mostly online) targeted to special interest & niche audiences. • Target to reach 40% - 50% of New Zealanders who regularly use RNZ. • RNZ audience mix better reflects NZ population.
RNZ (Current Path)	RNZ (GROWTH OPTION)
<p><u>DISTRIBUTION & ACCESS</u></p> <ul style="list-style-type: none"> • AM & FM radio networks; • Television (Audio only, + occasional video) • RNZ Websites (live streaming, on-demand, podcasts): radionz.co.nz; and thewireless.co.nz; • Mobile - iPhone and Android applications, online access; • Digital Shortwave (Pacific region); • Satellite radio (Pacific region); and • Social media - eg. Facebook, Youtube 	<p><u>DISTRIBUTION & ACCESS (Growth Option)</u></p> <ul style="list-style-type: none"> • RNZ is everywhere. • Use of all available distribution platforms - Radio, TV, online, mobile.... • Live + on-demand services • Full audio-visual capability across all services. • Ability to provide full linear television service, but on demand TV content would be the priority.
<p><u>OTHER</u></p> <ul style="list-style-type: none"> • Audio-visual capacity building steadily. • Funding increase will provide for improvements and modernisation but will be gradual. • AM Network – retained but becoming progressively more expensive to maintain. • AM audiences diminishing, planning for gradual retirement of non-key sites, replace with new FM, significant associated property holdings (\$40+ million). • Capital demands for legacy assets divert investment in more future-focused services. • Limited budget for research, marketing & promotion. • Resilience is limited – future cumulative impact of inflation, emergency events, legacy issues, unforeseen events have potential to compromise future development. 	<p><u>OTHER</u></p> <ul style="list-style-type: none"> • Significant increase in research, marketing & promotion. • Improved resilience – able to absorb impact of inflation, emergencies and unforeseen events without compromising services. • Augmented programme for modernisation and technology upgrades. • Accelerated transition from traditional broadcast platforms to new multi-media delivery allowing for surplus AM transmission assets (property and spectrum) to be returned to the Crown as part of business case for a funding increase.