Media Cities and the Reconstruction of Space and Place

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Professor Andrew Spicer, UWE Bristol; 20 November 2023

Abstract

This presentation explores the concept of a 'media city'. It begins with a definition: media cities are a planned, highly structured intervention that is part of a transformational change in the urban landscape. The presentation then discusses a particular example, MediaCityUK in Salford, Greater Manchester, built on a disused site at the end of the Manchester Ship Canal by private developers. My analysis looks in particular at the legacy of ITV's Granada regional franchise and the role of the BBC, which moved five departments to become MediaCity's 'anchor' tenant in 2012. This move is contextualised within the BBC's policies towards the UK's nations and regions and discusses the reasons why the Corporation felt it was necessary to relocate about one-fifth of its workforce outside London.

The presentation moves on to discuss MediaCity's impact on Salford and the Greater Manchester region, which had both positive and negative consequences. It created jobs and was the catalyst for substantial economic growth by attracting additional, often international firms, but did little to alter the highly uneven social geography of the region and returned huge profit to the developers, Peel Holdings. MediaCity has now been complemented by the growth of 'Enterprise City', which demonstrates a 'return' to the city centre and is driven by small-scale high tec companies rather than public service providers such as the BBC. The role of Andy Burnham as Greater Manchester's city-region mayor is discussed, principally his socialist desire to make economic development more accessible and beneficial to local communities, to 'do digital differently'.

The account concludes by looking at the broader disparities in the UK's highly uneven economy and the important role public service broadcasters continue to play, culturally as well as economically, despite the hostility of the Conservative government.

Thanks very much for that introduction and welcome. It's a delight to be here and have the opportunity to talk about my current research that's very much work in progress and also collaborative – with Professor Philip Drake at Manchester Metropolitan University. We're working together on a chapter in a collection on *Media Cities* that I'm co-editing with Professor Paul McDonald at King's College. In addition, this research forms part of a wider project – for a monograph entitled *Television in the UK's Nations and Regions: Economics, Cultures, Policies, Politics and Programming*, also to be published by Routledge.

The core focus of the talk will be on the development of MediaCityUK in Salford – which made a huge impact on me when I first visited the site with a Norwegian colleague in 2014 – why it was chosen by the BBC as the site for its partial relocation outside London in 2012 and its impact on Greater Manchester. I'll analyse the ways in which it has reorganised space and place within the region, and how this is changing, morphing into 'Enterprise City' with rather different dynamics. But I first want to contextualise MediaCityUK as a specific example of a global phenomenon – as its designation suggests it's the UK example of an international concept – and to frame my analysis as part of this wider enquiry about the role of the UK's public service broadcasters (PSBs) – the BBC, ITV, Channel 4 and Channel 5 – all of which come under the purview of the Communications Regulator, Ofcom and which, as

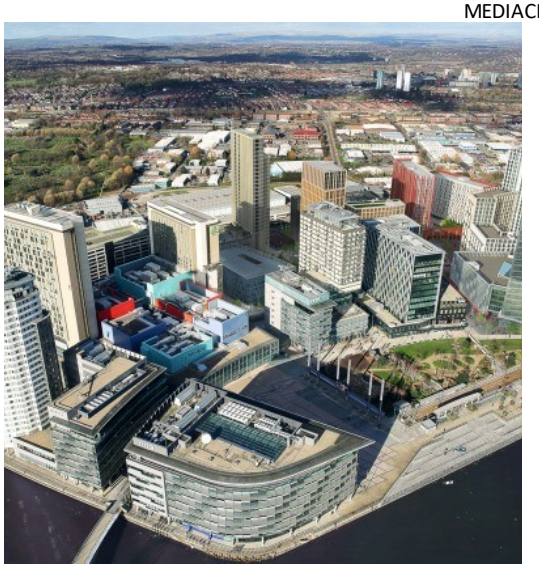
public service companies, are expected to exercise a degree of civic responsibility, acting in the public good, especially the BBC and Channel 4, which are not-for-profit organisations.

I'll end by drawing out what I think are the wider implications of the BBC's partial relocation to Salford and what it can tell us about broader social, cultural and political issues: centres and peripheries; geographical inequalities; local/regional identities and autonomy; and the tensions and contradictions in the spatial role of the PSBs.

First we need to consider the various contexts within which the BBC's move north took place.

MEDIACITYUK: Official Publicity Shot

MEDIACITYUK



Media Cities – Definition

The first media cities were developed in Middle East – including Cairo and notably Dubai – in the 1990s designed to create favourable conditions to attract firms from outside the region. From these initiatives the concept has extended globally. In contradistinction to incremental media development in which the screen industries are gradually interwoven with the existing infrastructure (Spicer 2023b), a media city is a planned, *purpose-built* development in which the creative industries provide the core of a large-scale, *transformational* change in the locality. Although the core focus is situating media firms, media cities provide additional large office, studio and exhibition spaces together with auxiliary luxury accommodation, retail, leisure and hospitality services and hi-spec technological provision (Mould, 2014). Typically, media cities are built on ex-industrial waterfront locations as part of more extensive urban regeneration projects, spearheaded by the creative industries. Media cities are designed primarily to attract *international* audio-visual businesses and are executed by private real estate companies in combination with government investment – national/regional – and incentives. As Tim O'Regan (2018, pp.10-15) argues, media cities (occasionally 'film cities') are the logical outgrowth of the globally dispersed production systems that are now a conspicuous feature of the contemporary media industry landscape, in which policy makers woo footloose globally dispersed production companies, offering not creative support but a convenient 'one stop' infrastructure, technological capabilities, and a broad range of co-ordinated facilities and service providers, creating a 'cinematic' space or landscape rather than being merely places of production.

Media cities are particularly desirable for 'second tier' cities (Krätke, 2003, 2018) such as Manchester, eager to increase their status in the global creative economy. Such cities are primarily concerned with enhancing their international presence rather than, or more than, attending to their regional function and engaging in relationship with comparable cities beyond their own regions. Nevertheless, in a developed media ecology such as the UK's, media cities exist in an often complex relationship with their locality and with existing production centres. This uneasy combination of global and local, of centrifugal and centripetal forces, is the contradiction that's at the heart of my analysis, which I will try to develop in what follows.

London's Dominance

London, the UK's only first tier city, is its capital and seat of government that has exerted long-term dominance over all aspects of British life. London is what Saskia Sassen (2011) calls a 'world city', which she defines as ones that have large populations, are financial hubs, headquarters for numerous multinationals and are nerve centres for networked flows of money, people, knowledge, services and goods. These world cities are also 'media capitals', 'centres of media activity, which have specific logics of their own; ones that do not necessarily correspond to the geography, interests or policies of particular nation states' (Curtin 2003: 203) but are orientated globally. London has always dominated the UK's screen industries: having the highest level of investment and venture capital, the biggest firms and the largest concentration of independent production companies (indies) that, alongside the PSBs, form the bulk of the screen industries. The capital exerts a strong gravitational pull on Britain's creative talent. Until quite recently, it was *de rigueur* to spend at least a period of any career in the UK media in London.

The BBC and ITV

Historically, the BBC has reinforced London's dominance. Under the founding guidance of John Reith, the BBC conceived itself as primarily a metropolitan broadcaster, the *unifying*

'voice of the nation' based in London. In his monumental history, Asa Briggs argues that what he calls the BBC's 'doctrine of centralization' meant the Corporation was very reluctant to cede autonomy and resources to the various regional outliers that were set up from the BBC's inception in order to reach all of the UK. Therefore these outliers lacked both resources and power, accorded very little autonomy. In 1943, John Coatman, BBC North's Regional Director, advocated that 'powers of control' should be devolved to the regions because 'the best broadcasting is that which is in most direct touch with the life of the people' Briggs, 1970, p. 343). However, after the war, the development of television, which required far greater resources and financial outlay than radio, increased London's dominance significantly. Thus the BBC bought Mancunian Films' studio – a converted Methodist Church on Dickinson Road, Rusholme – as its very modest northern television base in 1954. It was not until 1975 that the Corporation invested in a purpose-built studio – New Broadcasting House on Oxford Road near Manchester's City Centre. This parsimony was symptomatic of what Donald Read, writing in 1964, considered to be the BBC's failure to support a 'vigorous outward-looking regionalism', content to produce 'inward-looking' programmes designed to be confined to their own regions rather than presenting the region to the nation (p. 253). Indeed, when ITV was launched in the 1950s it was as a set of interlocking *regional franchises* precisely because the 1951 Beveridge Report on broadcasting had identified the BBC's pronounced 'Londoncentrism'.

ITV Franchises

One of the most successful ITV companies was Granada that had the north-west franchise. Its CEO, Sidney Bernstein, saw his mission, as a committed socialist, to forge a different type of broadcaster: 'The [north] represented a part of Great Britain that was independent in character and remote from the metropolitan traditions of the BBC. If any English region could contribute to a change in the face of broadcasting this was it' (quoted in Buscombe 1981, p. 121). Bernstein built the UK's first purpose-built television centre – then the most modern in Europe – on Quay Street in central Manchester, as part of his determination to enhance the city's amenities and cultural life 'so that the centre of Manchester may become an attractive place where young people can live and enjoy themselves' (*ibid.*: 67). Bernstein's creation of 'Granadaland', as it was dubbed in the press, has been credited as forging an 'imaginary community' that 'situated the north in public consciousness' (Hallam 2003, p. 20). Crucial to Granada's construction of a strong and distinctive regional voice was to afford its

programme makers far more autonomy than they would have enjoyed at the BBC, and by recruiting local creatives, notably 'northern' writers such as Jim Allen, Arthur Hopcraft and Jack Rosenthal. Tony Warren was encouraged to create *Coronation Street* (1960-), which became *the* iconic representation of working-class northern life.

Appreciating the role of Granada is important in understanding the nature of MediaCityUK because of its continued, if residual, presence, and also because it represented what Read considered to be a 'strong regionalism', a much more confident and outward-looking version than the BBC's, hence its greater importance in the development of Manchester as a broadcasting centre and training ground for regional talent. Although the ITV system had pronounced flaws – the intention to have two companies competing in each region thereby spurring each other to produce better and more regionally-focused programmes never materialised and the four largest companies quickly came to dominate and produce most of the 'networked' programmes that were broadcast nationally – arguably the ITV regional franchises, particularly but by no means exclusively Granada, remains *the closest the UK has ever come to having genuinely regional broadcasting*.

According to the BBC's first Regions and Nations Director, Pat Loughrey, whom I interviewed in June 2023, the regional nature of ITV exempted the BBC from taking its nations and regions responsibilities too seriously. The assumption that ITV 'looked after the regions and nations', formed part of what's often referred to as the 'cosy duopoly' between the BBC and ITV from the mid-1960s to the mid-1990s, a period during which the BBC's principal energies were devoted to securing its status as the preeminent national broadcaster and developing the World Service, arguably one of the Corporation's greatest triumphs and of inestimable value to the UK's status and its exercise of soft power influence. But since 2000, after the separate the ITV companies had amalgamated into one corporation located in London (Fitzwalter, 2008) – ITV has recently moved to the BBC's old home, Broadcast Centre at White City Place – there has been a significant shift in BBC policy, designed to enhance the Corporation's regional presence in order to fill the void created by ITV's 'retreat' to London. Loughrey was appointed to the newly created post of Nations and Regions Director in 2001.

Recognition of the BBC's responsibilities to the whole of the UK was enshrined in the revised Charter in 2007, which defined the BBC's role through five public purposes:

The BBC's Mission (https://www.bbc.com/aboutthebbc/governance/mission)

Our mission 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'.

This mission is realised through the BBC's five public purposes:

1. To provide impartial news and information to help people understand and engage with the world around them

The BBC should provide duly accurate and impartial news, current affairs and factual programming to build people's understanding of all parts of the United Kingdom and of the wider world. Its content should be provided to the highest editorial standards. It should offer a range and depth of analysis and content not widely available from other United Kingdom

news providers, using the highest calibre presenters and journalists, and championing freedom of expression, so that all audiences can engage fully with major local, regional, national, United Kingdom and global issues and participate in the democratic process, at all levels, as active and informed citizens.

2. To support learning for people of all ages

The BBC should help everyone learn about different subjects in ways they will find accessible, engaging, inspiring and challenging. The BBC should provide specialist educational content to help support learning for children and teenagers across the United Kingdom. It should encourage people to explore new subjects and participate in new activities through partnerships with educational, sporting and cultural institutions.

3. To show the most creative, highest quality and distinctive output and services

The BBC should provide high-quality output in many different genres and across a range of services and platforms which sets the standard in the United Kingdom and internationally. Its services should be distinctive from those provided elsewhere and should take creative risks, even if not all succeed, in order to develop fresh approaches and innovative content.

4. 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

The BBC should reflect the diversity of the United Kingdom both in its output and services. In doing so, the BBC should accurately and authentically represent and portray the lives of the people of the United Kingdom today, and raise awareness of the different cultures and alternative viewpoints that make up its society. It should ensure that it provides output and services that meet the needs of the United Kingdom's nations, regions and communities. The BBC should bring people together for shared experiences and help contribute to the social cohesion and wellbeing of the United Kingdom. In commissioning and delivering output the BBC should invest in the creative economies of each of the nations and contribute to their development.

5. To reflect the United Kingdom, its culture and values to the world

The BBC should provide high-quality news coverage to international audiences, firmly based on British values of accuracy, impartiality, and fairness. Its international services should put the United Kingdom in a world context, aiding understanding of the United Kingdom as a whole, including its nations and regions where appropriate. It should ensure that it produces output and services which will be enjoyed by people in the United Kingdom and globally.

In this talk, I'm just concerned with Public Purpose 4: the BBC's commitment to regional diversity and dispersed economic investment. Ofcom imposes quotas on all the PSBs for the proportion of primary spending – i.e. original programmes – that must be made 'outside the M25' – how the media defines out of London. The BBC's current quota is 50 per cent.

BBC Policy towards the UK's Regions and Nations

So how does the BBC try to fulfil Public Purpose 4: 'to reflect represent and serve the diverse communities of all the UK's nations and regions and, in doing so support the creative economy across the UK'? It's a very difficult challenge.

Both Ofcom and the BBC distinguish between the 'small nations' (Northern Ireland, Scotland and Wales) – sometimes referred to as 'national regions' just to confuse everyone! – and the nine 'English regions':

THE NINE ENGLISH REGIONS

In its policy towards the nations, the BBC's rule of thumb is that its spending should be in proportion to their populations. Because the 'Celtic nations' have 17 per cent of the UK's population: they are allocated roughly 17 per cent of the BBC's funding. The English regions are not nearly so well provided. This is partly because the nations have enjoyed, historically, more power and influence over BBC policy than the English regions – representatives of each nation sit on the BBC Board of Governors, now the BBC Trust – and they have benefited, correspondingly, from more ample resources, especially infrastructural investment. Devolution has only served to increase these disparities. However, as a UK institution, the BBC cannot support the demands of the Scottish and Welsh parliaments for fully devolved control over their national media.

This 'privileging' of the nations breeds intense resentment in the English regions. It's a matter of continuing irritation in my home city of Bristol how much more money is spent by the BBC in partnership with the Welsh government in Cardiff – spanking new offices right in the central square and a studio complex – than in the South West. Although the English regions also share the nations' resentment about London's dominance, they are neither a coherent nor united force of opposition: there are intense regional rivalries concentrated through their competing leading cities: between Sheffield and Leeds; Leeds and Manchester; Manchester and Liverpool and so on. The BBC's nations and regions policy therefore has to be a delicate balancing act. Whatever the Corporation does, some region or nation feels left out.

The Importance of Location: Clusters and Ecosystems

Large organisations, such as the BBC with its c.20,000 staff and an annual income of £5.7 billion, act as what economic geographers call an 'anchor firm', one large enough to attract other firms – including media services such as post-production – and additional ('spillover') investment, thereby stimulating and sustaining a local/regional media infrastructure that can nurture talent and sustain careers. These anchor firms are crucial in creating 'clusters' – a term defined by the influential Harvard economist Michael Porter as 'geographical

agglomerations of firms that collaborate and compete with each other', linked by intermediaries such as trade associations and cultural institutions (including universities) that provide 'enduring competitive advantages in a global economy' through local knowledges and relationships 'that distant rivals cannot match' (1998, p. 78). Clusters have been the mantra for regional and city planners since Porter's argument gained widespread acceptance as they are assumed to afford a range of benefits:

However, the BBC is not a firm like Rolls Royce, or Lloyds Bank. It is the 'voice of the nation', a century old 'brand' (Johnson, 2012), known throughout the world, wielding enormous prestige, symbolic power and status that goes way beyond its size and turnover. Part of its role, as defined in Public Purpose 4, is to produce stories that help shape regional identities, playing what Mike Kidd and Bill Taylor argue in *Television in the Nations and Regions*, is a 'crucial role in expressing and exploring our changing sense of community. They consider that television is 'part of the glue that binds us together socially and geographically' (2002, p. 4). That's what Coatman and the BBC's other regional directors were lobbying for: broadcasting that is 'in direct touch with the life of the people' promoting a strong, vibrant and inclusive regional self-consciousness.

However, as several commentators have argued, the mere fact of *situating* a BBC office or studio in a particular place 'does not in itself constitute a commitment to regional creativity and cultural diversity' (Davis 1993, p. 79). In *Producing British Television Drama: Local Production in a Global Era* (2019), Ruth McElroy and Catriona Noonan observe that although the BBC filmed both *Dr Who* and *Sherlock* (2010-17) in its purpose-built Roath Lock Studios in Cardiff, neither represents Wales nor speaks to Welsh experiences and identities; one producer referred to Cardiff as just a convenient production 'warehouse'. Thus relocation, which I'm now going on to consider, is not a solution but *part of a wider process*. However, I need to make one further point before I analyse the BBC's move to Salford.

International Marketplace

Since the 1990s there has been what is often described as a television 'revolution' in which broadcasters, formerly almost exclusively national organisations, have become part of an

international arena facilitated by digital forms of distribution and now dominated by streaming platforms – Netflix, Amazon Prime, Disney+ etc – that operate to a global *commercial* logic in which 'territories' are not defined by national boundaries because they are conceived as markets not cultures. The streamers are also not regulated by national governments. They are now *producers* as well as distributors, commissioning original content from companies in the UK and elsewhere. They have very deep pockets. Netflix has an annual *production budget* of £10.3 billon, compared to the BBC's £2.3 billion, ITV's £1.3 billion and Channel 4's £680 million. As producers, the streamers have, so far at least, intensified London's dominance. In July 2019, Netflix set up a permanent base at Shepperton Studios in south-west London as the location for its expanding UK production, complementing Disney's earlier ten-year deal with Pinewood Studios in London's Home Counties hinterland.

Despite their relatively modest resources, the UK's PSBs are expected to compete in this global marketplace. The BBC created BBC Studios in 2017 as a commercial production company to make almost all of what was formerly in-house production. BBC Studios is able to pitch and produce content to other broadcasters and streaming platforms as well as for BBC programmes, all of which now go out to tender. In 2018, BBC Studios was merged with the existing distribution and marketing entity BBC Worldwide to ensure that its productions are promoted globally. BBC Studios also acts as the distributor for a number of either wholly-owned or partially-owned indies. So there are now *two* BBCs, the residual public service broadcaster (making new bulletins, children's and educational programming ('reserved functions') and a trading entity that operates as a business but with the crucial difference that any profits are ploughed back into the Corporation rather than distributed to shareholders.

Overall, one can argue that the UK's PSBs are expected to perform three contradictory functions, to:

(a) Sustain and consolidate their role as *national broadcasters*, providing news services and a broad range of programming. They televise national occasions – royal weddings, state funerals and major sporting events – thereby fostering a sense of the UK as a nation, promoting a 'national identity', and sense of 'national community'.

(b) Act as decentralised organisations that reflect in their locations, and/or programming the UK's regional and cultural diversity.

(c) Be commercially successful global players that can compete in the international market, producing programmes whose production values are high and whose audience appeal is world-wide.

How did the BBC's partial relocation to Salford affect these processes?

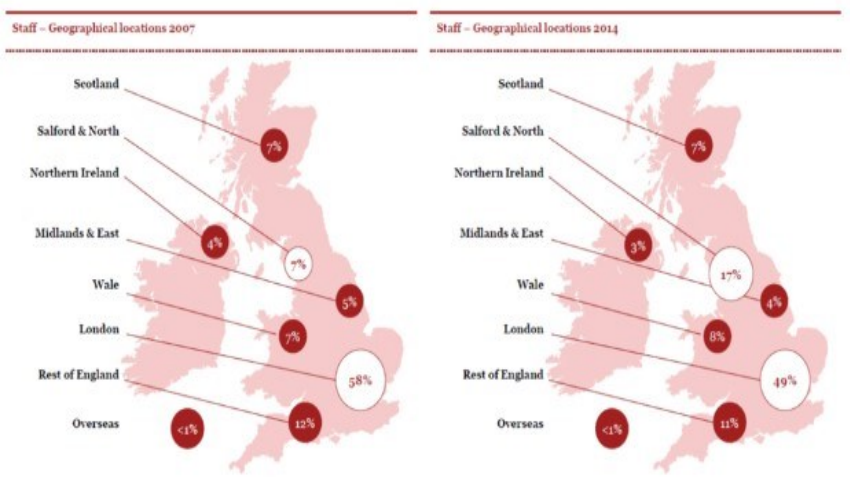
Relocation to Salford, 2004-12

The origins of the BBC's partial move to Manchester go back to 2004. As I've mentioned: the BBC developed an increased sense of regional responsibility after 2000 as that ITV abandoned its regional franchises, becoming acutely aware that, in the words of Sir Michael Lyons, Chair of the BBC Trust in 2008: 'The BBC is seen to be too preoccupied with the interests and experiences of London. People elsewhere simply do not see their lives adequately reflected on the BBC' (quoted in McElroy 2011: 178). The Corporation acknowledged that although 25 per cent of licence payers live in 'the North', only 8 per cent of network programme are made in that region: 'Our audiences in the North have told us that

they feel less well served and represented and a new creative hub in the North will help redress this balance' (n.d. in Evans: 195). The BBC also came under direct pressure from New Labour committed to encouraging significant regional growth and stimulating urban regeneration led by the creative industries (Lee et al., 2014).

As far as one can ascertain, Manchester was always seen as the location to establish this northern base. A 'strictly confidential' document in the BBC archives (dated October 2005), reveals there were three principal reasons, a combination of pragmatic economics and the attempt to win audience approval and which resulted in a large scale relocation of staff:

Reasons for the BBC's Choice of Manchester



Relocation of BBC staff in the period 2007 - 2014[1]

The North has the lowest BBC approval in England;

BBC spend per head is lowest in the North, and current BBC TV network spend [in Manchester] is half that in either Birmingham or Bristol;

Granada's downscaling of its Manchester operations gives us the opportunity to build on *an existing talent base*;

There was an existing option to redevelop the BBC's Manchester site.

At this point there were four possible sites: 'Central Spine' or Quay Street, both in Manchester; Greengates (central) or Quays Point (to the far west of the borough), in Salford. The 'out of town site', Quays Point, was considered 'less attractive than the three city centre sites' (184: 4) as the initial preference was for a media 'village' – 'a collection of buildings with varying uses' (184: 12). Without further detailed documentation of BBC discussions, we have to conclude that the Salford Quays site had become the most attractive option when the decision was finally taken in 2006. The site shared the characteristics of media cities elsewhere that I've mentioned: a 200 acre ex-industrial waterfront site, Salford Docks, left empty after its closure in 1982 – in an area that was *already* in the process of being redeveloped. In 1982 Salford City Council had bought the site from the Ship Canal Company and set up an Urban Regeneration Council in 1983 in partnership with key private sector interests to form a single private entity committed to regeneration of the area. It won a £15million grant from the Derelict Land Grant Scheme to begin the long procedure of water decontamination and removing derelict buildings (Robson, 2016). In the process, the 'Docks' became the 'Quays', the new home for arts, culture and waterside living, a new economic and social entity (Wind-Cowie, *Escape Velocity*, 2017, p. 10). The Lowry Arts Centre and the Imperial War Museum North, funded in part by National Lottery grants, which opened in 2000 and 2002 respectively, were the frontrunners, making Salford Quays a tourist destination, made accessible by new roads and a metro link spur in 2010. The construction of

MediaCity was a regional partnership between Salford and Trafford Borough Councils and Peel Developers, one of the UK's largest property development companies whose headquarters are in Manchester. Thus in 2006 when the BBC announced its move, the Corporation could position its relocation as part of a wider, ongoing, process of urban regeneration that was creating a location attractive enough to induce London-based staff to move north, benefit from a range of facilities and services, and also feel virtuous about taking its civic responsibilities and Public Purpose 4 seriously.

Phase 1

The BBC moved five departments to Salford: Children's Television, Sport, Radio 5 Live, the Breakfast Show and Religion and Ethics, plus the Future-focused Media and Technology areas of Research and Development. Additionally, existing BBC North staff at Oxford Road central Manchester, including the BBC Academy, regional and local news, the Philharmonic Orchestra and technical operations, were relocated to Salford, 2,300 staff all told. Their presence made Salford Quays a second major broadcasting centre outside London, a process completed by April 2012. The BBC rents three main buildings, forming the core of the 'Phase 1' – an investment of £650m (KPMG, 2021: 37) – that included apartments, hotels and leisure facilities, and The Studios, now Dock 10, the facilities company that runs MediaCity's technological infrastructure. ITV – which still had a base making local news and *Coronation Street* – moved from Quay Street in Central Manchester to MediaCity in 2013. As it developed, MediaCity gradually hosted more than 250 businesses, including international ones such as Ericsson, the Swedish telecommunications giant and the northern base for the Dutch-owned 'megaindie' Endemol Shine, as well as the Media Department of Salford University. In an interview with me in June 2015, Mark Senior, the CEO of Dock 10, predicted that more London indies will recognise the need to have offices in the regions. He considered that as the media industry becomes more globally interconnected it will become 'less reliant on 'the guy round the corner' and look to a number of 'core providers of facilities and skills', thus reinforcing the conception of MediaCity as a *global hub* rather than, or more than, a regional presence, which goes back to the contradictions between regional, national and international geographies that I've identified.

In ‘Building Public Value’ (June 2004) the BBC’s then Director General Mark Thompson expatiated about relocation’s ‘transformational impact on the creative industries and media talent base across the North of England’. However, the development of MediaCity has been controversial. What’s often referred to as the BBC’s ‘lift and shift’ strategy (moving entire, established departments) has been criticised for its failure to work with the indigenous creative workforce (except ‘existing talent’ from ITV or the BBC’s Manchester outpost) or engage with the locality. Brett Christophers argues that MediaCity’s creation took no real account of the wider economic-geographical reality of Salford, one of the UK’s most economically and socially deprived areas, and was noticeable for the absence of local community input. In his view it exemplified a neoliberal ‘tradition of market-oriented and property-led urban development strategies framed around place-marketing, interurban competition, and gentrification’ (2008, p. 2314). A House of Commons Committee of Public Accounts Report (2013) was also quite critical, arguing that the BBC risked becoming overly dependent on the site owners Peel Group for its long-term success. An August 2017 report by Centre for Cities was also highly critical, arguing that only a third of the predicted 15,000 jobs had been created and of these, a further third were relocations from elsewhere in Greater Manchester. The *Financial Times* reported in 2017 that the BBC’s move had had ‘negligible effect on local employment’. The BBC admitted that more staff had relocated from London than had been anticipated and therefore the ‘move did not inherently increase the regional background of those working at the Corporation’ (Evans, 2024, p. 199). A recent report by Bruce Tether (2022, p. 34), discussed further later, described the BBC’s local impact as ‘modest’. Relocation also didn’t in itself lessen London’s *decision-making* dominance. When I interviewed Nicola Shindler, the CEO of RED Production in April 2015, shortly after the company had moved offices from central Manchester to MediaCity, she reflected:

> ‘What hasn’t happened and what was never going to happen is the commissioners moved out of London. The whole industry is still totally London-centric. All decisions are made in London. I have to travel to London at least once a week, twice this week. There’s absolutely nobody from drama who comes up here. So it all still happens in London.’

The BBC disputed these findings, claiming in its 2018 Annual Report that the move had ‘saved’ £90 million and that the new Salford ‘cluster’ was worth £3.1 billion to Greater Manchester’s economy, double what it contributed in 2010. A BBC-commissioned report by KPMG, published in 2021stated that the BBC’s staff had risen to 3,048 (p. 37) and that broadcasting firms such as SIS, had located its headquarters in Media City as a direct result of the BBC; and others – notably Kellogs, A.J. Bell (online investment) and TalkTalk (1,800 employees) had also moved in to the new ‘cluster’ (p. 38). In 2017 the Tomorrow Building – a new creative and tech flexible workspace had opened (p. 39). The 2010-19 growth figures the report includes are impressive, including an increase of 150 per cent in digital or creative businesses (from 155 to 380, p. 39); and the number of creative industry jobs by 142%, from 6,310 to 15,275 (p. 39). The report also (p. 41) quotes Sean Anstee, Greater Manchester Combined Authority lead for employment and skills, that the BBC’s move was ‘instrumental in sparking a creative and digital revolution in the city region’. Anstee’s remark is typical of the self-interested boosterism that I’ll go on to discuss.

Phase 2

It was the digital revolution that came to dominate Phase 2 of MediaCity, a £1.6 billion expansion approved in September 2016. The next slides summarises the main elements of this expansion:

Phase 2: Digital, tech, real estate (2016)

- Phase 1 completed 2010
- Phase 2 announced in 2016, to over double the size
- Focus on creative/tech businesses
- £1bn construction started 2020
- Peel/Legal and General Capital
- 1400 homesinc 19 story Lightbox
- 540,000sqft office
- Tomorrow building/hotel
- The Watergardens – leisure/retail
- Landsec buys 75% stake inMediaCity development in 2021 for £423 million

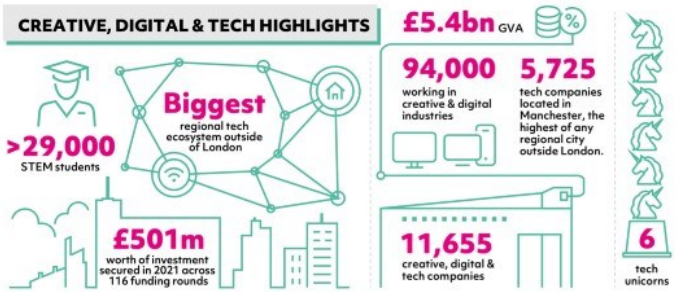
The core components of Phase 2 are no longer 'legacy media' (publishing, film, television) but 'new media' (online/digital), IT and e-commerce in what developers defined as a '*a media, tech and creative cluster*' with 'tech-driven and creative buildings'. There is a new kind of 'anchor institution', The Landing, recently rebranded as HOST (the Home of Skills and Technology), in the Blue Tower, which self-describes as 'the hub for next generation entertainment, designed to 'incubate' start-up creative businesses, thus extending MediaCity into digital/tech industries more broadly defined – for example gaming, immersive content creation, AI, cyber-security and data science. According to the CEO of its owners (IN4.0 Group), HOST will 'establish an ecosystem that supports skills, growth and innovation in the region'. According to one account, HOST is at the heart of the cluster bringing micro-businesses into contact with large media and tech companies to drive the digital economy: 'This [synergy] has augmented the place-making initiatives around the Quays, bringing in new cultural and environmental stakeholders who have helped to create a self-sustaining momentum within the Quays cluster.' (Wind-Cowie, *Escape Velocity*, 2017, p. 20).

However, it is clear from Greater Manchester Combined Authority (GMCA)'s inward investment arm, MIDAS, that media industries are only *one* element in the city's accelerating redevelopment. Typical of the new MediaCity tenants is The Hut Group, known mostly for online beauty and wellbeing products, which also has offices in Altrincham and its HQ at Manchester Airport. Phase 2 has seen a major growth of office space, a new hotel and The Watergardens leisure/retail development. However, perhaps the most conspicuous feature is the huge expansion of residential development – 1,400 homes including the 19 storey Lightbox. Paul Dennett, the leader of Salford City Council, contends that 'Quays is the UK's

only true digital, creative and media hub and encourages new 'fused' companies that bring together tech and creative industries to generate fast growth' ('Foreword', *Escape Velocity*). However the same report (p. 30), argued that a 'Western Gateway' should be opened up to connect Salford with Liverpool and that twin brands of Manchester and MediaCity have eclipsed Salford's identity as a city, which needs to be addressed by developing a new brand – 'Silicon Salford' or 'Creative Quays' (p. 42). Perhaps the historic identity of Salford is indeed at risk as the high-rise dwelling that are such a feature of 'Manctopia' are built apace and a 'digital corridor' is created.

Manchester– Salford digital corridor

- **Investor driven discourse of 'Manctopia'**
- GMCA/MIDAS as intermediaries
- **Gaming and Content Creation** : Manchester has companies such as: Team 17, Smashmouth Games, Cloud Imperium Games, Rezzil and Epic Games. Five universities offering specialist gaming and related courses with Unity's UK Training Centre of Excellence. 2022 saw the launch of HOST Esports Studio in MediaCity.
- **Cyber Security:** UK government's intelligence, security and cyber agency, GCHQ strategic hub in Manchester. National Cyber Force (NCF) to receive more than £5 billion of investment by 2030.North West Partnership for Security and Trust (NWPST) launched October 2021 between GCHQ and Lancaster University, University of Manchester, Manchester Metropolitan University and University of Salford.



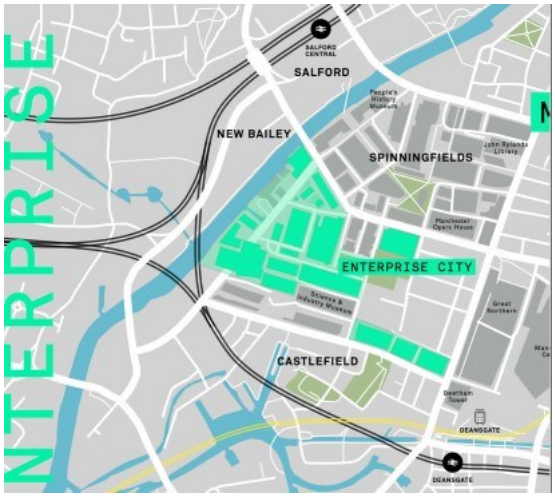
The BBC's 4-part 2020 documentary, *Manctopia: Billion Pound Property Boom*, anatomised Manchester's real-estate boom and the gentrification and displacement of its poorer inner-city neighbourhoods, the stark realities of the soaring rents (40 per cent increase in five years, and far more since 2020), the growth in building luxury £1million+ apartments and the shortage of affordable housing. As well as displacing formerly working class neighbourhoods, all of these developments have consequences for the smaller creative businesses and workers that MediaCity was designed to incubate – increasingly such start-ups have been driven by rising rents to relocate out of the city to Stockport, Macclesfield and further afield.

The UK's largest property developer, Landsec, bought a 75% stake in MediaCity development in 2021 for £423 million, clearly convinced of the region's commercial potential. The consequences for 'original' tenants such as the BBC and ITV, as well as new start-ups, are as yet unclear, as MediaCity is now just one asset in Landsec's huge property portfolio. The BBC intends to move out of one of its buildings, Bridge House, by spring 2024. This is characteristic of large firms post-COVID as they move to 'hybrid working' but also because of a significant downsizing in the BBC's Children's Department (the main occupants). Although this does not, I think, prefigure a wholesale move out of MediaCity, nevertheless, because the BBC's lease extends until 2030, it will continue to pay rent on the building unless another tenant can be found, a reminder of possible consequences of the 'dependency' critique that was levelled at the BBC during the 2013 House of Lords' scrutiny, mentioned before.

From Media City to Enterprise City

From MediaCity to "Enterprise City"?

- 2million+ sq ft development in Manchester citycentre
- 21 buildings / 12,000 workers in tech, media & creative industries
- Branded as *"**a media, tech and creative cluster** designed to connect people and businesses, encourage collaboration, and create success through expert place -making.*
  ***Enterprise City provides a series of tech -driven and creative buildings** where modern industry can flourish by focusing on digital skills, exemplary talent, new technologies and global communication."*
- *"Enterprise City is now a true place of experience that has come to life. **It's now a real live tangible place that is characterised by the St. John's EXPERIENCE pillars: Enterprise, Culture and Living** . Enterprise City is taking shape and already has so much to offer, everything you need for work, rest and play. Everything you need to thrive in today's modern age. **Once complete Enterprise City will be one of the most concentrated city centre hubs for digital, creative and media businesses in Europe, delivering strong growth in high-value employment."***
- Language of industrial pasteg "Manchester Goods Yard"



As this slide shows, in many ways the city centre has now returned as a focus for large-scale regeneration. The old iconic Granada Studios on Quay Street has become a private Soho House members' club and luxury, boutique hotel. With amazing foresight, Sydney Bernstein had always intended that it could be converted in this way if the ITV companies went belly-up: a genuine possibility in their first three years of operation before independent television had established itself. The Granada building is now part of a newly created district, St John's, a '*a real live tangible place that is characterised by the St. John's EXPERIENCE pillars: Enterprise, Culture and Living*', its name apparently derived from St. John's Gardens located in this area of Manchester.

ENTERPRISE CITY® is a registered trademark of Allied London.

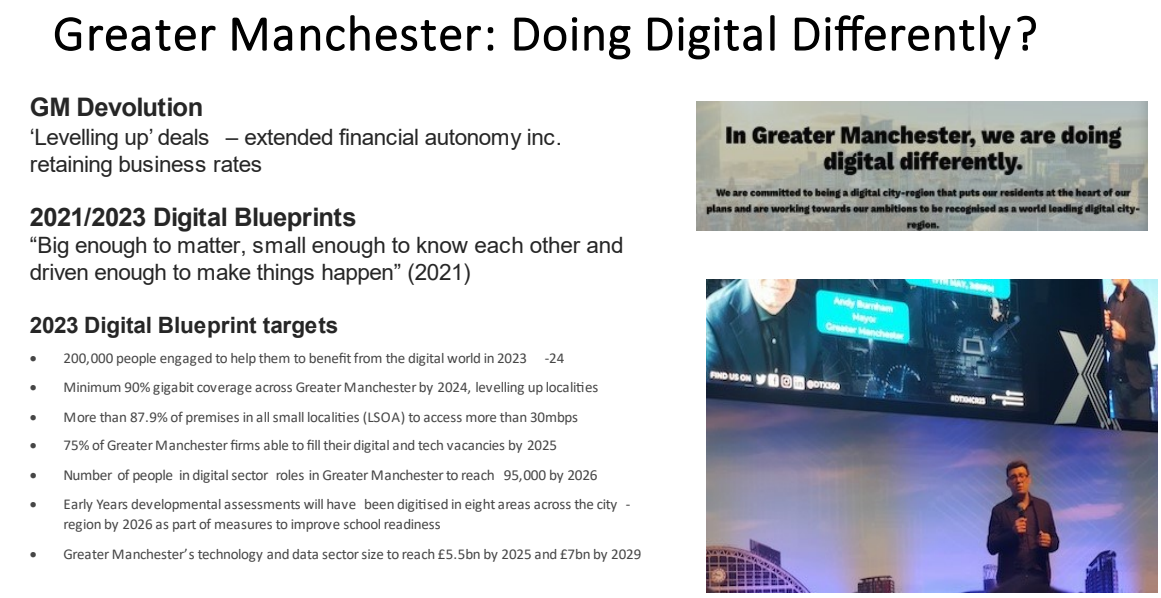
- **Booking.com's** new "Brooklyn-inspired £80m transformation at the old Granada Studios site in Manchester city centre, their 2nd largest office globally, 450 new +200 future jobs
  https://youtu.be/ZTfhRLTPFkE
- **Factory International**
  £211m home for arts, including Manchester International Festival, opens end of June 2023

https://youtu.be/iD_EiniJ7o0

‘Enterprise City’ is a registered trademark of another huge property development group, Allied London, that has headquarters in London, Leeds and Manchester – ‘the UK’s three key cities’ (https://www.alliedlondon.com/contact/). Enterprise City is the location for the online giant Booking.com’s new headquarters and Factory International, whose Aviva Studios opened in June 2023, a huge new cultural venue reportedly costing £211million, draws on Manchester’s global musical heritage, especially Factory records, and is the permanent home for the Manchester International Festival. As an indication of the resurgence of central Manchester as a media hub, Nicola Shindler, having left RED production, and founded a new company, Quay Productions, in 2021, has moved back to Quay Street in central Manchester, which she had left almost a decade earlier when RED Production moved out to MediaCity.

Does this development signal the end of MediaCity as a dynamic production node? This seems unlikely given the scale of the existing investment. Manchester-based media companies – such as Nine Lives Media whose CEO, Cat Lewis, I interviewed yesterday – are convinced that the two entities can co-exist, fulfilling different functions that are, for the moment at least, complementary. But it may indicate that MediaCity is no longer, or no longer exclusively, the preferred future as the principal driving force shifts from legacy media to high-tech digital operations.

Devo Manc: Doing Digital Differently?



I’d like to shift now from buildings and economics to *city governance* and the broader political issues pivoting around devolved city-regions. Over the last two decades, following the example of the Celtic nations, the argument for a measure of devolution in the England has gathered momentum. Rather than ailing relics of industrialisation, cities have been identified as unique sources of economic productivity and dynamism, with the capacity, given the right focus such as elected mayors, to transform regional economic fortunes (Moran et al., 2018, p. 195). The Economy 2030 report, *In Place of Centralisation* (November 2023), argued for a shift from the UK’s ‘exceptionally centralised’ system of governance to more empowered regional authorities, equipped with the necessary resources, powers and incentives to make strategic decisions on behalf of their locality without reference to

Westminster and to take charge of holistic city/regional planning schemes. Referring to London, which already has 'relatively advanced' devolution, the report advocates 'Trailblazer Deals' with Greater Manchester Corporation and the West Midlands, in which Whitehall transferred greater responsibilities to the city-region councils, the 'most significant of which would be the creation of a "single settlement" to replace the disparate grants received by local government' (p. 13). This decentralisation would circumvent what the report argued was the current principal weaknesses of fragmentation and limited finances that undermines local governance.

Commentators contend that Manchester is well-placed to be at the forefront of a more devolved English regional policy (albeit well behind London) because of its robust traditions of self-belief and civic boosterism, its 'proud provincialism' derived from being the world's first industrial city in the nineteenth century (Briggs, 1968; Wyke, 2016; Spicer, 2019), in which local authority leaders have embraced the need for economic and cultural regeneration and the necessary profound reorganisation of space and place. Manchester is the earliest ex-industrial city to have reinvented itself – it was the first one to submit a City Pride plan in 1993 – its local leaders pragmatic and astute, dedicated to giving Manchester a new direction and image (Robson, 2016, pp. 351-52). Greater Manchester had been a metropolitan council from 1974 until it was abolished by Margaret Thatcher in the 1985 Local Government Act, which significantly increased the centralisation of UK governance. However, the former authority offered a precedent for acting at a *regional* level, incorporating Greater Manchester's ten boroughs into a wider structure. Thus what has become known as 'Devo Manc' (the Greater Manchester Combined Authority [GMCA] established in 2011) is the attempt to recreate a city region out of the ashes of the old metropolitan county. However, the major problem faced, setting aside the pandemic, has been finding sufficient resources in an era of fiscal austerity (Moran et al. 2018).

The major expansions, as noted, have been largely real estate development backed by politicians that have struggled to create a regional economy where local labour skills match the globally successful companies' requirements, thus a physical transformation but not a corresponding social transformation in which marked inequalities remain. In what they call a 'deal-based devolution' (2018, p. 204), Moran et al. opine: 'it is unclear how an economic model based on financialised residential and commercial property development can provide widely distributed social benefits' (p. 203). As the authors point out, net gains in the centre and South West mean that the outer northern boroughs (Oldham/Rochdale/Tameside) are the losers. A recent analysis (2023) by Professor Bruce Tether and his team at Manchester University already referred to, has shown that although Manchester's creative industries are the largest outside London, their geography within the city-region *remains highly uneven*: there are strong creative industry clusters, but also very substantial what Tether calls 'sparse spaces', with little to no creative industry presence. This should come as no surprise because these large scale developments – MediaCity and Enterprise City – have been *developer and investor-led* rather than community-driven forms of regeneration, leading to this uneven development and thus the inequalities Tether identifies. Enterprise City and the real-estate and digital boom in Manchester offer clear evidence that the much-vaunted spillover effects of Manchester's creative industries are concentrated in existing regenerated areas and for those workers who are already affluent. These developments may indeed be complicit in driving out occupants from older, working class neighbourhoods whose residents still have little access to creative and digital industries jobs. Although Manchester is widely cited across Europe as an exemplar of urban regeneration, this is for its *economic success rather than social regeneration* (Robson, 2016, p. 392).

Andy Burnham, elected mayor of GMCA in 2017, a well-respected and influential Labour politician (a former government minister, 2007-10), is well aware of these problems and is determined to pursue policies that address social justice rather than solely economic advancement. Burnham has several advantages. He inherited stable political control under a largely unchallenged Labour council, and considerable devolved powers – over transport, housing, planning, policing, skills and employment, health and social care – that were partly the result of the then Conservative Chancellor George Osborne's determination to create a 'Northern Powerhouse' announced in June 2014 as part of the Government's commitment in 'rebalancing growth across the regions and nations of the UK'. This policy was apparently further bolstered when Boris Johnson committed his party to a 'levelling up' agenda in July 2021. Although both policies have widely publicised flaws – most conspicuously, a high-speed rail connection to London, HS2, is no longer going beyond Birmingham – they indicate a recognition that London's dominance is problematic. Thus in March 2020 Burnham agreed an enhanced seventh devolution deal in which 100 per cent of business rates were to be devolved to GMC, alongside powers over transport and education. Despite his socialist credentials, Burnham also represents, *par excellence,* what David Harvey (1989) has argued is the change of local authority leaders from managers to entrepreneurs, ones who take an entrepreneurial stance in relation to economic development, engaging in public-private partnerships in forms of 'speculative construction' (p. 8), in which their principal task is 'to lure highly mobile and flexible production, financial and consumption flows into its space', with local government underpinning private enterprise and taking on part of the burden of production costs (p. 10).

As an economic and socialist 'place entrepreneurs' (Robson, 2016, p. 187), Burnham's campaign slogan is that Manchester 'does digital differently', deriving from its roots in the Co-operative movement and whose Nineteenth Century cotton workers refused to use enslaved-picked cotton during the American civil war. Launching Greater Manchester's Digital Blueprint Strategy, Burnham stated:

> A true digital city region is not just about high-end industry, it's where everyone can find their place and we need to work hard on that. Let's not leave anyone behind.
>
> Success will be defined by someone living in one of our 10 boroughs and looking at a city centre digital community where they know they can aspire to work. Only then will we be tapping into the full diversity of the workforce on offer.

To open access to the notoriously elitist creative industries, Burnham has pioneered a new technical qualification – the MBac. UTC, a college for 14-18 year olds 'specialising in creative and digital courses' was opened in MediaCity to train students in this particular employment pathway (https://www.utcmediacityuk.org.uk/). However, though admirable, Burnham's task to change Devo Manc from an economic to a social success will be a long and difficult one.

Geographical 'Imbalances' and Inequalities in the UK Economy

In his report, Tether also suggests that 'the geography of Manchester's creative industries replicates at the city-region scale the inequalities that exist at the national level' (2022, p. 7). In his magisterial *The UK Regional-National Economic Problem: Geography, Globalisation and Governance* (2016), Philip McCann identifies these inequalities as 'geographies of discontent' and 'geographies of exclusion'. His analysis demonstrates the profound structural imbalance of the UK's economy, which he anatomises as 'one of the most interregionally

unequal large high-income country' *globally*, its sub-national government funding and capital expenditure among lowest of any large OECD economy (p. 409). McCann argues that these destructive interregional inequalities are compounded by the UK's 'highly centralised, top-down, largely spaceblind and sectorally-dominated governance system' (*ibid*.). So Manchester's problem is a national issue in a UK economy that as McCann shows, continues to be dominated by London and South East England.

Having shown the importance of regional governance, I need now to bring us back to the role of the public service broadcasters. Recognising the importance of the BBC's partial relocation to Salford to increased production levels in the North West region, Ofcom commented that the concomitant was 'large reductions in the Midlands and east of England', reflecting: 'there is clearly a trade-off between creating sustainable regional hubs, and ensuring diversity of supply from around England' (Ofcom, 2015, p. 9). Similar inequalities have resulted from Channel 4's move out of London in 2017-18. Although Channel 4 retains its London presence in Horseferry Road SW1, it has established two regional 'creative hubs' in Bristol and Glasgow and its new headquarters in Leeds. Birmingham and Manchester were thought to be the frontrunners but although Channel 4's decision was the result of an open competition – 4 All the UK – the decision to go to Leeds may have been influenced by the perception that the UK had a significant East-West media imbalance and therefore locating in Leeds was an attempt to address this unevenness and to help 'rebalance' the UK's screen ecology (Spicer, 2023a). Nevertheless, Manchester, Birmingham and Cardiff all feel they have missed out. This was expressed most bluntly in Salford City Council's *Escape Velocity* pitch, which stated that although other cities might wish to recreate the success of the Quays 'they should focus their attention on other sectors, as the UK digital broadcast and media sectors are not of sufficient scale to accommodate multipolar clusters of excellence' (pp. 35-6). The Council also argued that 'other cities and regions bidding for Channel 4 should understand that they risk diluting or distracting from their potential as emerging clusters in other sectors' (p. 36), advocating that Salford becomes the 'default option' for the relocation of creative sectors, including Channel 4 (p. 39). Channel 4 were deaf to Salford's pleas and their move to Leeds has led to a significant regeneration of its media heft although, as a publisher-broadcaster that commissions rather than produces programmes, Channel 4's urban footprint is far smaller than the BBC's (or ITV's) and therefore not part of a 'media city' in the North East.

As with the withdrawal of ITV from the regions, the BBC is conscious of these imbalances. In its latest five-year policy statement 'Across the UK', announced in March 2021, the Corporation, designating the West Midlands as an 'area of deficit', committed to making significant investment in the development of the Digbeth creative cluster in Birmingham with a new headquarters buildings due to open in 2026. In a recent untitled Screen Forum address (4 July 2023), Andy Street, the West Midlands city-region Mayor, argued: 'The future of creative content is already here: it's a world of digital platforms, short-form content and agile production methods. The West Midlands is already a proving ground for a new kind of digital production infrastructure adapted to meet those needs, with a £50 million large scale 5G Testbed underpinning this evolution. He identifies the West Midlands' cluster of videogames companies, 'stretching from Leamington Spa to Wolverhampton', as an example of the way in which "smart specialisation" can create a globally renowned and internationally competitive sector. However, although Street was clear that such developments have to be conducted on a regional level to bring different elements together, this expansion would not be happening without the BBC performing its tradition role as an anchor firm, as the 'backbone'.

The Birmingham initiative forms part of the BBC's wider commitment to increase its primary spend beyond the M25 to 'at least' 60 per cent, locating a further 400 jobs outside London. More interestingly and perhaps more significantly, the BBC's 2021/22 *Annual Plan* (p. 29) argues that its new policy represents a shift to a *distributed model* that 'moves commissioning power and decision-making to the whole UK' by '*moving commissioners rather than buildings*', with a commitment to double the number of regional commissioners outside London to 30. As the BBC's current Regions and Nations Controller, Rhodri Talfon Davies, admitted in his Screen Forum address, 'The Role of the BBC in Regional Development', the BBC's case for Charter renewal in 2027 will in part be based on the role it plays in stimulating and supporting regional economies. Thus the BBC is pursuing a dual policy: continuing to invest in major regeneration projects and new buildings alongside a more flexible dispersed model in which commissioners move and the Corporation provides a nationwide training programme based in various regional centres but also opened up through using digital interfaces.

Conclusion

MediaCityUK is significantly different from its Middle Eastern antecedents. As I hope to have made clear, its construction has taken place within a highly developed and complex UK media ecology subject to a raft of checks and balances that are as much historical and political as they are economic. As O'Regan (2018) argues, place-based studies of media industries – even media cities – need to attend carefully to how media is interwoven into the physical fabric and histories of individual cities, which take particular shape in different cities, and which 'show just how individuated cities can be' (p. 17). Savitch and Kantor (2002, p. 31) contend that cities have their own 'defining identity and perceptible behaviour', their urban development managed from 'the resources at their disposal' that define 'their bargaining position with businesses, their urban development strategies, and their disposition to balance economic and socio-political considerations'. Cities, they suggest, have predispositions to operate in certain ways using existing assets, exemplifying 'intense and specific location-based thinking' (p. 18).

Allen J. Scott argues in his seminal *The Cultural Economy of Cities: Essays on the Geography of Image-Producing Industries* (2000) that the media, perhaps especially television, as symbolic, meaning-producing 'experience goods' have a crucial and irreducible cultural dimension. As Salford's concern about its distinctiveness as a city becoming obliterated by a high tec 'media city' demonstrates, developments in media provision interpenetrate with deep-seated, age-old concerns about regional identities that hold great importance for local communities. As Robson (1986, pp. 389-91) notes, Manchester's residents are sceptical about the significance of the shiny glass and steel buildings of MediaCity and perhaps, though its development is taking place after Robson's analysis, of Enterprise City, which has become the prime focus of investment capital, political interest and energy, embodying the shift from legacy to digital media, to IT/high tec firms that require rather different physical and infrastructural resources and which might indicate a 'return' to city centre development.

As I have shown, public service broadcasters cannot, in themselves, address the pronounced inequalities that remain a disabling feature of UK cities. Indeed, as argued, they may even compound or exaggerate them creating gentrified 'quarters' or 'media cities' that are inaccessible to most of the local populace. Similarly, although PSBs may act responsibility in moving out of London in an attempt to 'rebalance' the UK's profoundly uneven media ecology and economy, their efforts generate further imbalances and renewed, possibly heightened, rivalries. Salford's contention that only MediaCity has sufficient critical mass,

'escape velocity', to break London's gravitational pull was resented by other regions looking for a share of the media pie.

It is also the case that the PSBs are only one element in wider struggles about national and regional devolution that, if they are to counter effectively London's dominance, need to be exercised through a wide range of activities including transportation and services. However, the PSBs have been subject to marked hostility from the present Conservative administration: the BBC has had its licence frozen and has suffered 30 per cent cut in income (Barwise and York, 2020); Channel 4 has been the subject of various attempts at privatisation (Brown, 2021). This hostility limits either PSBs' ability to simulate local economies or produce a range of attractive programmes, especially dramas, that would contribute to their capacity 'to reflect represent and serve the diverse communities of all the UK's nations and regions'. This political antagonism would seem ideologically motivated and also in contradiction to existing policy commitments because, as shown, the PSBs participate actively in 'levelling up', albeit very selectively – in the BBC's words, 'Sustainable growth requires a rebalancing of the economy towards high-tech, knowledge-based sectors … The BBC helps to support sectoral rebalancing of the UK economy towards high technology industries that build on its comparative advantages.' (BBC 2011, pp. 5, 35).

As audiences decline and the competition from the streaming platforms intensifies, the whole function and future of public service broadcasting is being called into question. Assuming they do have a future, what should be their role going forward? Is their primary function to be national *unifiers*, to be part of the 'glue' or cement that keeps what Michael Keating (2021) calls the UK's 'fractured union' together? Or, as demands for devolution widen and intensify, is it to enhance regional and national differences and thereby represent the UK as a diverse, multicultural entity that celebrates difference? Should the PSBs devolve spending to the nations and regions to enable them, as *autonomous entities*, to develop *in their own way*.

I hope what I have argued today has been stimulating and I look forward to trying to answer your questions about these important concerns.

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