

FOREWARD

This country is an extraordinary triumph of hope over experience.

We don't have a single unifying language, a homogenous culture or a tightly connected geography. We are a small population spread across one of the largest spaces of any country in the world. We are a grand experiment in plurality, inviting people from all parts of the world to make their homes here and to celebrate what makes them different, yet at the same time asking them to embrace an idea of what it means to be Canadian. We cherish a collective national identity built not only on our diversity and uniqueness but also on the values and beliefs that bind us. This, is Canada.

As Canada's public broadcaster, CBC/Radio-Canada has always played a vital role in the lives of Canadians. We are a champion of Canadian culture, connecting and amplifying the many voices that make this country so special; a forum for sharing our citizens' beliefs and values, enabling democratic discourse and engagement; an advocate for a shared national consciousness, linking communities across the country; and a promoter of great Canadian talent and content.

This is who we are. And why we exist.

The Government of Canada has set out ambitious objectives for Canadian culture: that it should strengthen Canadian identity, support the Canadian economy and tell the world what Canada is about. These ambitions are set against the backdrop of significant disruption in Canada's cultural and broadcasting sectors in the ever-changing digital era. New and rapidly evolving technologies, ongoing shifts in audience behaviours, and the global dominance of intermediary foreign-owned technology platforms such as Google and Facebook, are formidable disruptors. In this new world, giving Canadian content the support to thrive is critical.

At CBC/Radio-Canada, we are transforming to meet the challenges and opportunities of digital. We continue to evolve our platforms, reach and content to meet the needs of Canadians in communities across the county, offering programming in English, French and eight Indigenous languages. We share our government's ambitions for a strong, vibrant cultural sector, and agree that Canada has the potential to be one of the most competitive creative economies in the world.

We also believe that Canada's public broadcaster has an important role to play in helping realize these ambitions. We welcome the opportunity to share CBC/Radio-Canada's vision for supporting the creation, discovery and export of Canadian content in a digital world.

Sincerely,

EXECUTIVE SUMMARY

The Government has launched public consultations to develop a modern cultural policy framework for a digital age centred on three principles: it should focus on citizens and creators, reflect Canadian identity and promote democracy, and support social and economic innovation.

These principles are already deeply embedded in the work that we do at CBC/Radio-Canada. They are also central to our evolution going forward.

CBC/Radio-Canada has long been an important part of Canada's cultural fabric, connecting and amplifying the many creative voices that make Canada so special, promoting and enabling democratic engagement between citizens, and showcasing our country's great talent. Our award winning news and current affairs programming, talk radio, popular made-in-Canada comedy and drama, and robust coverage of important international events like the Olympics, regularly engage and inspire Canadians and bring us together as a nation. For francophones in particular, our work allows them to connect their language and culture to the rest of the country in a way that would otherwise be very difficult in a world where English is so dominant.

Our work shapes our collective Canadian identity, grows our economy and supports a thriving artistic and creative sector. We have transformed in recent years, through our five-year strategic plan *Strategy 2020: A Space For Us All (Strategy 2020)*, to embrace the new ways in which Canadians now discover, consume and experience information and entertainment, and we are evolving still.

But in order for Canadian content to flourish in today's world of borderless, limitless content, Canada needs a radically different approach to supporting culture in this country. And, if Canada wants a strong creative sector at the heart of a strong cultural ecosystem, its model for supporting public broadcasting must also change.

CBC/Radio-Canada is at a critical juncture, recovering from deep funding cuts in recent years and operating under a business model and cultural policy framework that is profoundly broken. Advertising revenues for conventional television are declining, shifting to global technology companies such as Facebook and Google, which have established dominant positions. Subscription revenue from specialty channels is decreasing, as Canadians turn to unregulated online streaming services such as Netflix. The funds used to support Canadian content creation are also under threat.

At the same time, CBC/Radio-Canada – and all Canadian conventional broadcasters – operate under the constraints of a dated policy and regulatory model that online competitors such as YouTube, Netflix and Apple TV/iTunes, simply don't have.

All of this is eroding our ability to deliver on our public service mandate.

The potential for Canada to become a cultural powerhouse is very real. Technology is evolving rapidly, the world is increasingly connected, and there is a vast global marketplace for great Canadian content. Moreover, our Canadian brand is strong and growing. The world wants more of Canada and CBC/Radio-Canada is poised to deliver.

This position paper offers a vision for what a strong public broadcaster, fuelling the growth of a strong cultural sector, looks like. The example of Britain, which is reaping the rewards of a cohesive culture strategy and sustained investment in culture and public broadcasting, is instructive. Often compared to the BBC, Britain's public broadcaster, CBC/Radio-Canada is funded at a significantly lower level -- \$34 vs. \$114 (per person). In fact, Canada's public broadcaster is funded much lower than virtually all other comparable countries. Indeed, the BBC offers a compelling model of how an advertising free public broadcaster with a strong public service mandate can serve the interests of domestic audiences and, at the same time, support the global ambitions of the country's creative and cultural sectors.

CBC/Radio-Canada has the potential to build on its already strong legacy in Canada to drive our country's cultural agenda and strengthen its creative economy. But we need to make some changes of our own.

In this paper we outline our vision and recommendations for the future.

Our Vision

Four Priority Areas

Our future builds upon our successful *Strategy 2020* and is centred around four priority areas: Digital Innovation; Contributing to Shared National Consciousness and Identity; Creating Quality Canadian Content; and, Promoting Canada to the World. The transformation of our organization is well underway but we need to deepen and intensify our work in these areas. They will define our future.

An Ad Free Public Broadcaster

In this paper, we make the case for stable, long-term, sustainable funding of Canada's public broadcaster and examine the benefits of moving away from advertising as one of our sources of revenue. This new model would allow us to put more focus on our public service mandate, provide a more distinct and engaging offering for Canadians, and become a stronger and more valued partner to communities, creators, cultural organizations and other broadcasters.

Our studies show that an ad-free CBC/Radio-Canada would yield substantial economic benefits, among them a net total GDP gain of \$488M, a total labour income impact of \$355M, and the creation of 7,200 jobs in the Canadian economy. Moreover, two-thirds of the CBC/Radio-

Canada advertising revenue would migrate to other Canadian media companies, giving them an additional influx of revenue as they adapt to industry changes.

Making this vision a reality – completing our transformation and moving to an ad-free model -- would require a new commitment to, and investment in, CBC/Radio-Canada. Our studies show that the per-person impact of such an investment would be equivalent to \$12 per Canadian, bringing our total funding to \$46 per Canadian, still well below comparable countries.

Recommendations

If public broadcasting is to become a true driver of Canadian culture and a key source of social and economic strength for this country, a number of critical issues related to our broken system must be addressed. Canada has an opportunity now, as part of its consultations on Canadian content in a digital world, to reboot Canadian culture and public broadcasting, to benefit all Canadians.

Our recommendations include the following:

1. Develop a cohesive cultural investment strategy. This strategy would include:
 - A Canadian cultural industries council, using Creative Britain as an inspiration;
 - A coherent policy framework to regulate conventional broadcasters and new media entrants evenly, including a mechanism for new media entrants to support Canadian content; and
 - The flexibility and rights to allow CBC/Radio-Canada to invest in Canadian creators and promote Canada to the world, including greater opportunities for investment in content and its distribution.
2. Increase per person funding to the CBC/Radio-Canada to \$46 -- an increase of \$12 per Canadian. This is the (inflation adjusted) per person funding amount recommended by the Standing Committee on Canadian Heritage in 2008.¹ This will enable CBC/Radio-Canada to make the necessary long-term investments to complete our transformation, to move away from advertising as a source of revenue and to anchor our cultural ecosystem.
3. Depoliticize CBC/Radio-Canada funding so that it is predictable and stable, tied to the existing 5-year licence cycle, indexed to inflation, and separated from the election cycle and annual government budget cycle. This would be similar to how the BBC now operates. Indexation is critical -- without it, inflation of just 1.5% per year would erode the new government funding of \$150 million to zero in just 6 years.

This is an important consultation for Canada. The stakes in getting a new cultural framework right are high. These consultations will determine the future impact of culture and public broadcasting for this country. We believe the potential for both is remarkable if we invest in and harness our collective cultural strength. We welcome the opportunity to contribute to this discussion and look forward to helping shape this important work.

¹ CBC/Radio-Canada: Defining Distinctiveness in the Changing Media Landscape", Report of the Standing Committee on Canadian Heritage. February 2008. Recommendation 4.4, pg 113.

I. WHO WE ARE AND WHY WE EXIST

CBC/Radio-Canada's mandate to inform, enlighten and entertain Canadians is even more relevant now, in a world of limitless global content, than it was when we were founded in the 1930s when Canada worried about a wave of American culture overwhelming our own unique cultural identity. Since that time, we've had the privilege to be given a place in Canadians' homes, on their desktops, tablets and smartphones; to offer them a Canadian perspective on news, current affairs and world affairs, distinct drama, uniquely Canadian humour and a commitment to arts and documentary programming not found anywhere else. We meet our mandate in English, French, and eight Indigenous languages. Our work enables francophones to be profoundly connected to their language and culture in a world dominated by English.

But our value to the country goes well beyond informing and entertaining; CBC/Radio-Canada is at the very heart of Canada's cultural eco-system. Culture is a major contributor to the Canadian economy, generating almost 93 billion dollars annually.² Our work supports a thriving Canadian artistic community and creative sector, including the many artists, filmmakers, writers, producers and the people with whom they work. Every incremental dollar invested in CBC/Radio-Canada creates an economic multiplier of 2.11 in gross value added (GVA) to the Canadian economy, by generating other economic activity through our predominantly Canadian suppliers.³

Our work supports job creation in the creative sector, contributing to stronger local economies. In television alone, our investment in Canadian programs supports more than 10,000 jobs in the independent production community.⁴

Beyond our direct contribution to the economy, we also nurture local talent. We have been an important stepping stone for many Canadian artists, often at a critical moment early in their careers, **(link to well-known CBC/RC alumni)** providing a forum to showcase Canadian talent to the country and to the world. **(link to Révélations and Virtuoses)**.

This is our legacy. But it's also our future. And we are well positioned to face the opportunities and challenges ahead. The world is changing, and so are we.

² "Culture output totaled \$93.2 billion of 3.0% as a share of total economy" Statistics Canada 2010 <http://www.statcan.gc.ca/pub/13-604-m/2014075/culture-4-eng.htm>

³ Economic Impact of CBC/Radio-Canada. Deloitte June 2014 <http://www.cbc.radio-canada.ca/files/cbcrc/documents/latest-studies/cbcradio-canada-economic-impact-deloitte-2013.pdf>

⁴ Nordicity estimates for 2015/16 based on data from CBC/Radio-Canada, CMPA and Statistics Canada (October 19, 2016)

II. OUR 2020 TRANSFORMATION - THE RIGHT PLAN AT THE RIGHT TIME

Like other media organizations, CBC-Radio/Canada has faced unprecedented disruption in the communications and media industries. In 2014, we launched our five-year strategic plan *Strategy 2020: A Space for Us All (Strategy 2020)* to address the many challenges and opportunities and strengthen the public broadcaster for the digital age.

It came at a critical time in our evolution. It was designed to transform the organization and put us on sound financial footing in the face of deep funding cuts. It has been an important step in making us more nimble, more reflective of our communities, and more interactive and engaged with Canadians.

Our plan included three core priorities: become a digital-first organization, create more distinctive quality Canadian content for all Canadians, and become more local to better serve communities.

More Digital than Ever Before

Today, we are becoming a digital-first organization. Canadians don't just watch and listen to programs any more, they engage directly through comment and social media, and share across multiple platforms.

These behaviour shifts have disrupted existing media business models and fuelled the success of global technology companies such as Google, YouTube and Facebook – platforms that have allowed CBC/Radio-Canada to expand our reach and introduce our content to a broader audience.

But while Canadians have access to more information than at any time in history, much of it is now curated by a small number of companies, which are using sophisticated data analytic capabilities and broad platforms of influence to meet – and shape – the demands of their audiences.

These global technology companies are the new gatekeepers of content.

In the face of these realities, CBC/Radio-Canada has focused on maintaining, expanding and improving our own strong, successful Canadian-owned and operated multi-platform service, with a direct connection to Canadians.

We have also focused on digital innovation, bringing new, creative approaches to strengthen what we offer Canadians. Radio-Canada realized the potential of 'over the top' (OTT) capabilities early on, launching Tou.TV in 2010 and Tou.TVextra in 2014, both of which have found a strong subscriber base. CBC Music, launched in 2012 after a year spent securing unprecedented online licensing deals with nearly 1000 major and independent labels, was a Canadian streaming music

pioneer. This year, Radio-Canada launched Première PLUS, which was recognized for its ground-breaking approach to thematic discovery of digital audio content, and gives users access to a world of original content, available anywhere, anytime. **(LINK TO FACT THAT IT WAS NAMED ONE OF THE THREE MOST INNOVATIVE INITIATIVES AT THE LAST RADIO DAYS GLOBAL CONFERENCE)**. CBC Radio is the Canadian leader in podcasting, with its podcasts being downloaded 1.7 million times per week.⁵ **[Add LINK to Someone knows Something]** Vote Compass has brought a unique and innovative digital political experience to millions of Canadians and has been used successfully in both federal and provincial elections since 2011.

And we are constantly adapting to new technologies and emerging media formats, through our in-house innovation incubators such as Accélérateur d’Idées, focused on digital innovation. **(LINK TO ACCÉLÉRATEUR)**

Our digital efforts are paying off.

We now reach over 16 million Canadian users each month through our own desktop, mobile and native apps. This is 2.5 million more than in 2015, and 4 million more than in 2014, when we launched *Strategy 2020*⁶. We are closing in on our goal of 18 million monthly Canadian users by 2020.

Perhaps most significantly, CBC/Radio-Canada is using these digital services to engage audiences across all age groups and demographics. We are reaching 60% of online Millennials each month and we're the top digital News/Information property for Canadian Millennials.⁷

Our digital reach in Canada now consistently rivals some of the best-known digital companies in the world.⁸

We are more digital than ever before and we have no intention of slowing down - because we are responding to what our audiences want.

More Quality Canadian Content

We are also focused on creating more quality Canadian content than ever before, to inform, entertain and bring Canadians together.

⁵ (Source: Sumo Logic, Public Broadcasters Podcasting Guidelines, Sept 6, 2015 - Sept 3, 2016)

⁶ Source: comscore Media Metrix, Multiplatform, Total Canada, Monthly Average (Jan 2016 – August 2016; 2015 comparison based on Jan-Dec 2015 monthly average; 2014 comparison based on July-Dec 2014 monthly average – note, multiplatform data became available in comScore as of July 2014)

⁷ Source: comScore Multiplatform, Total Canada, 12-month average, Sept 2015 - Aug 2016, Category = News/Information, A18-34

⁸ Source: comscore Media Metrix, Multiplatform, Total Canada, Monthly Average (Sep 2015 – August 2016)

News & Current Affairs

CBC/Radio-Canada's news teams provide citizens with the information they need to make informed choices in their lives and to understand themselves relative to their communities, their country and the world. We address national issues of concern and engage citizens in conversations about these issues, whether related to the future of their health system or our country's response to climate change. We are committed to sustaining and nurturing ongoing opportunities for Canadians to engage in our democracy.

Through our network of foreign correspondents and journalists on special assignment, CBC/Radio-Canada also provides Canadians with a unique and firsthand window to the world. **[Add link to JF Bélanger in Paris]** Our correspondents have been with the refugees as they trek towards Europe, on the ground in Syria to bear witness to the plight of its people, and in America's rustbelt towns to understand the political dynamics at play in the U.S. election.

Our current affairs teams bring Canadians the stories that matter most, leading conversations that challenge and provoke debate, reflect the diversity and complexity of Canadian society, and encourage democratic engagement. These include stories such as *Metro Morning's* reporting on the subject of "Carding" **[LINK]**, our Thunder Bay news team's report on the funding gap faced by First Nations schools. **[Link]**

Our investigative journalism shines a light on issues that raise our collective consciousness and often motivates action. Radio-Canada's signature program *Enquête* has become an icon of investigative journalism in this country. Its work on corruption in the Québec construction industry led to the Charbonneau Commission. Its stories on the alleged abuse of Indigenous women at the hands of the police won the highest journalism award for public service journalism – The Michener Award.

Our Indigenous Unit's recent work around the unsolved cases of missing and murdered Indigenous women drew out the human dimension behind each story, creating content for all of our platforms, including interactive digital sites for each missing woman. It moved people, but it also brought new insight the investigations for the RCMP. We are now deepening the impact of this work with a virtual reality documentary through our award winning radio program *The Current*. **[LINK to The Current virtual reality documentary.]**

Our journalists also collaborate with the International Consortium of Investigative Journalists on important international stories like the "Panama Papers" which uncovered a concerted effort by some companies and individuals to move money offshore and avoid paying taxes.

Through our excellent work in these areas, we have become one of Canada's most trusted and influential news brands.

Entertainment Programming

Our popular and uniquely Canadian entertainment programming reflects the diversity of our great nation and draws audiences from across the country.

Radio-Canada's comedy programs *Les pêcheurs* and *Infoman* and drama series *Unité 9, Les Pays D'en Haut* as well as the recently launched *District 31*, have attracted massive audiences [PUT AUDIENCE NUMBERS IN A LINK] at a time when even the French market is showing signs of decline in viewership for Canadian programming. When Radio-Canada launched its new programs in September, five of the top ten most watched French programs in Canada that week were ours. [LINK] Radio-Canada places a special emphasis on supporting and promoting French Canadian creators and artists, which in turn ensures we appeal to our audience.

CBC's distinctly Canadian offerings, including *Kim's Convenience*, *Murdoch Mysteries*, *Still Standing*, *Heartland*, [LINK to each program] and more, stand apart from the largely American or American format content offered by other broadcasters. CBC takes special pride in providing a home for Canadian comedy and satire, such as *The Rick Mercer Report*, *This Hour Has 22 Minutes* and the recently launched *Baroness von Sketch*, comedy that is deeply cultural and connects Canadians in unique ways.

Programming That Brings Canadians Together

Our work connects, inspires and gathers Canadians around important Canadian moments.

During the Olympic and Paralympic Summer Games in Rio, we brought Canadians the stories and achievements of their athletes. These were the most-watched Summer Games in Canadian history, with over thirty-two million Canadians experiencing the Olympics, and ten million the Paralympics. They engaged with us through television, radio and apps, as well as through our presence on broader technology platforms such as Twitter, Instagram and Facebook.

We united Canadians around the historic and emotional celebration of The Tragically Hip, Canada's unofficial poet laureates. For nearly three hours on a summer Saturday night, almost twelve million Canadians at home and around the world paused to pay tribute together. They gathered around screens and radios and at hundreds of public viewing events in theatres, parks and pubs. *The Tragically Hip: A National Celebration* [Add LINK to this] was broadcast nationally and streamed live and commercial free across all CBC radio, television and digital platforms. Few shared national experiences have carried the weight and impact of this event.

Last December, Radio-Canada's iconic gathering – *Bye, Bye* – to bid the year farewell, one of the most anticipated annual shows in French Canada, was watched by nearly ninety per cent of all francophones watching TV that night – something it continues to do year over year. Similarly,

for 13 years, Radio-Canada's wildly popular *Tout le monde en parle* has ignited passionate conversations, drawing a third of all francophone Canadians watching TV on Sunday.

CBC/Radio-Canada has made a significant investment in showcasing signature events like *The Gillers*, *The Canadian Screen Awards*, les prix *Gémeaux*, le *Gala de l'ADISQ*, *Canada Day* and the *Country Music Awards*. We are also planning a range of inspiring programming to celebrate Canada's 150th anniversary next year.

Our efforts to make these important Canadian moments available to all Canadians, across multiple platforms, are yielding results. We are evolving with Canadians, connecting with them in new ways, with a unique Canadian offering that is resonating.

More Local than Ever Before

Today, CBC/Radio-Canada reaches communities across the country through our 88 radio stations, 27 television stations, and 34 regional websites. We share local news, shine a light on local cultural and creative industries, and contribute to local economies.

Our established presence across the country, and our ongoing focus on digital, provides a remarkable platform to share the voices, issues and ideas that reflect Canada's unique communities. This is particularly true in Official Language minority communities where we are important amplifiers for language and culture. We are strengthening that commitment. Radio-Canada has recently created two national reporter positions in Alberta and in Acadia to share local news across Canada's francophone communities.

As a result of our 'digital and mobile platforms first' approach to creating and sharing content, we now offer 18 hours of continuously updated digital local news each day.

Our local coverage is often compelling and powerful, serving not just the immediate community but the country. A good example is our coverage of the fires in Fort McMurray, which received 20 million page views on our website. **[ADD LINK TO OUR FORT MCMURRAY COVERAGE ROLLUP]** Another is CBC Halifax's ongoing coverage of a Syrian refugee family's journey in Canada. **[add a link to our stories]** From the time they landed at the Halifax airport, to settling in Yarmouth and opening up a chocolate shop, to donating a portion of their sales to the relief efforts in Fort McMurray, we have connected Canadians to their experience. In September of this year, in a speech at the United Nations, this family was recognized as a symbol of what Canada represents.

The world is starting to notice Canada. Today as large global news organizations are using their size and strong global brand to set up 'outposts' in Canada in an effort to grab audiences and advertising revenues, our local presence is more important than ever. Our teams live in these communities. They know these communities. They are personally connected to the stories and the issues that are driving local conversations. They care what happens.

As part of prioritizing ‘local’, we are also transforming our local stations -- from Halifax to Rimouski, to Matane, to Sudbury to Moncton – so that our teams have the technological tools to support the great work they do. When we had the inaugural opening of our new station in Moncton last September, over 2,500 people showed up to celebrate with us. [\[add link to virtual tour of Moncton station\]](#)

We are proud of the talent, creativity and commitment of our CBC/Radio-Canada employees who have helped to transform our organization during the last few years. Their work is delivering value to Canadians.

But we are already looking to the future, imagining the potential of Canada’s public broadcaster and considering how we need to evolve to best meet Canadians’ need for a vital, relevant public broadcaster in a sector where no one seems to be able to predict the future.

III. **FACING AN UNCERTAIN FUTURE**

CBC/Radio-Canada is at an important juncture.

In 2015, after years of deep funding cuts, the federal government has started to reverse these cuts. This is helping us to achieve many of the goals in our *Strategy 2020* plan, including creating more original new content for the first time in many years, reinvesting in more local news and digital services, expanding our innovative global pop-up news bureaus to bring world news to Canadians in a direct and timely way, and digitizing our legacy archives, so that more Canadians can see them.

This reinvestment is an important sign of the government’s commitment to Canada’s cultural sector and to public broadcasting. And, it has given us some much-needed breathing room. But it is not enough to secure our future.

Broken Business Model for Conventional Television

The business model and cultural policy framework in which CBC/Radio-Canada operates and carries out its public mandate is profoundly and irrevocably broken. Advertising revenues for conventional television are down as audiences become more fragmented, ad-free content becomes more available, and alternate content providers such as YouTube, Netflix, Amazon, AppleTV/iTunes and others continue to make inroads.

In the meantime, the advertising revenue that once funded Canadian programs is going to new competitors; large, global technology companies like Facebook and Google have established a dominant position.

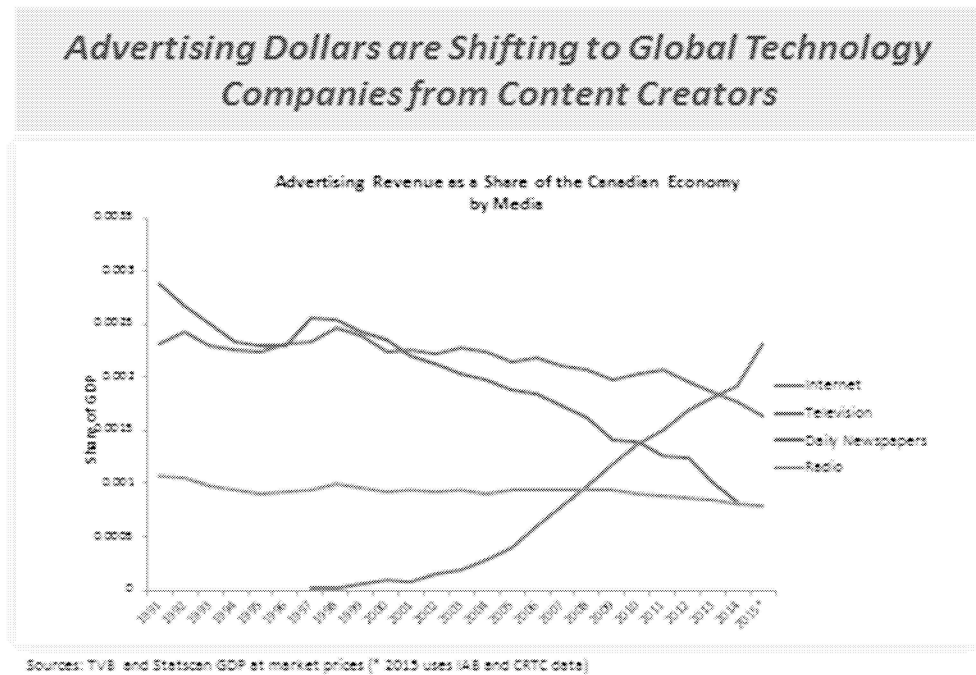


FIG 1: Advertising revenues are shifting from Canadian media companies to global technology companies.

Last year in Canada alone, advertising revenue for conventional television dropped 3% -- \$55 million in one year. The year before it dropped \$270 million.⁹

In addition to the advertising challenge, the other primary source of self-generated funding for the public broadcaster, subscription revenue from our small number of specialty channels, is under pressure. The trend of cable cord cutting, coupled with policy and regulatory changes like “Pick and Pay”, mean that traditionally secure sources of funding are also under threat.

Canadians are turning to unregulated online streaming services, which have experienced significant growth in a short period. In just five years, Netflix has been adopted by nearly half of the Canadian population.

⁹ ThinkTV (TSS Report) 2015/16 and CRTC Annual Report 2014/15

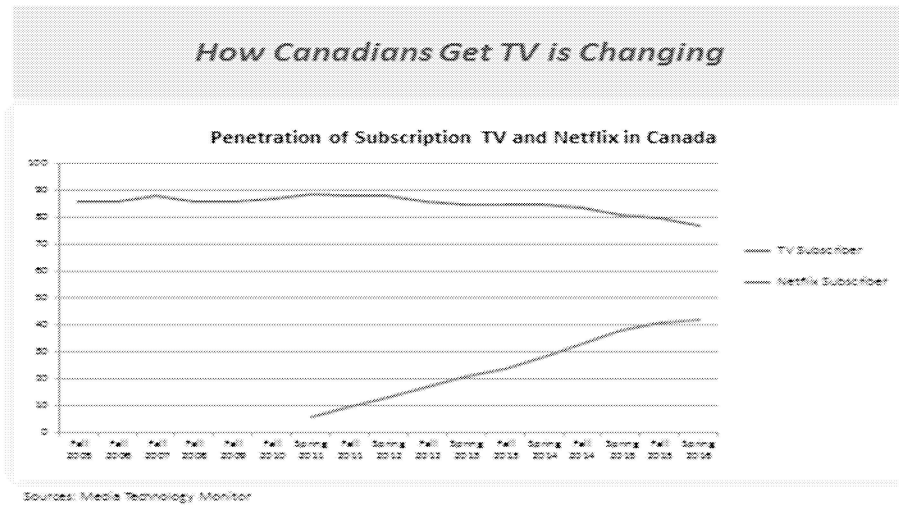


FIG 2: Subscription TV revenues are down as Canadians shift to Netflix

Subscription revenues for Internet connectivity are also growing fast.

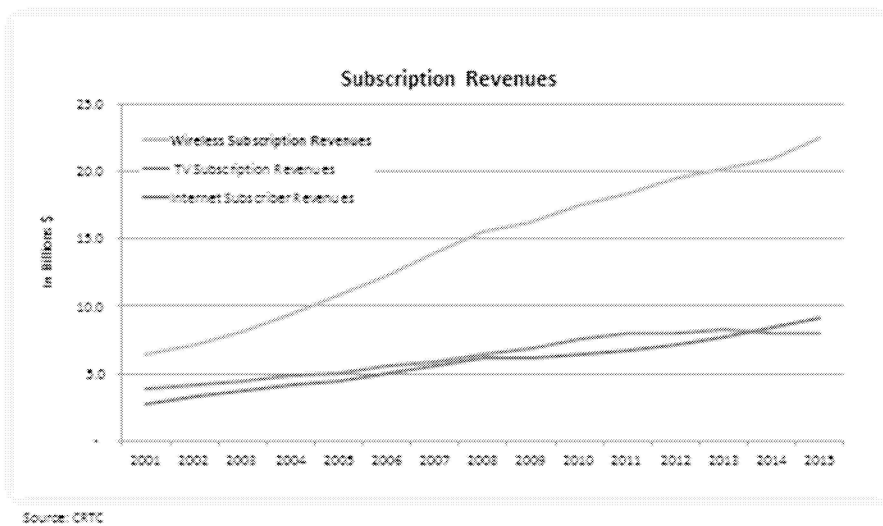


Fig 3: Subscription Revenues

But the problem is that none of these new revenue growth areas are supporting Canadian content creation.

The challenge for a public broadcaster like CBC/Radio-Canada is that it does not have other business interests or sources of revenue, like other Canadian vertically integrated broadcasting distribution entities, to mitigate the impact of these changes. We are uniquely damaged by this loss of revenue, and the least well-positioned to respond.

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The planned government reinvestment of \$150 million per year will help maintain the status quo for a period. But it will not solve the problems over the long-term.

Canadian Content Funding is Declining

In addition to our revenue challenges as a broadcaster, CBC/Radio-Canada also faces declining support for the creation of Canadian content. In addition to our own commercial revenues, the funding for this content comes from three sources: the Canadian Media Fund (CMF), the CBC/Radio-Canada government funding and a system of production tax credits and other incentives. Currently, we invest almost \$700 million each year in creating Canadian content. And, unlike our private sector competitors in Canada, we air over 80% Canadian content in primetime (below).

Fall 2016 : CBC, CTV, Global and City

Network	PM	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday		
	7:00	Marketplace	Just for Laughs Gags	Hello Goodbye	22 Minutes	Rick Mercer Rpt	HNIC	Heartland		
	7:30	Coronation St.								
	8:00	Murdoch Mysteries	Rick Mercer Rpt 22 Minutes	Dragons' Den	Nature of Things	Marketplace			This is High School / Canada's Smartest Person	
	8:30		Kim's Convenience Mr. D.	The Romeo Section	First Hand (Doc Stand)	Hello Goodbye			This Life	
	9:00	Shoot the Messenger				the fifth estate				
	9:30	The National								
	10:00								The National	
	10:30									
		7:00	etaik			Grey's Anatomy		etaik	W5	NFL (continued)
		7:30	Big Bang Theory					Big Bang Theory		Sportscentre
8:00		Gotham	The Flash	Blindspot	Big Bang Theory The Goldbergs	Grimm	Big Bang Theory American Housewife	Once Upon a Time		
8:30		Lucifer	This is Us	Criminal Minds	Notorious	The Exorcist	Mike & Molly Anger Management	Secrets and Lies		
9:00		Conviction	Marvel's Agents of S.H.I.E.L.D.	Designated Survivor	How to Get Away with Murder	Blue Bloods	Saving Hope	Quantico		
10:00		Entertainment Tonight								
10:30		Entertainment Tonight (Canada)								
		7:00	Kevin Can Wait		Survivor	Superstore The Good Place / The Great Indoors	MacGyver	Canadian Crime Stories	Border Security	
		7:30	Man With a Plan	NCIS						The Simpsons
		8:00								NCIS: LA
	8:30	Chicago Fire	Bull	Chicago Med	Pitch	Hawaii Five-O			Madam Secretary	
	9:00	Timeless	NCIS: New Orleans	Chicago P.D.	The Blacklist / Pure Genius	Canadian Crime Stories	Canadian Crime Stories		Elementary	
	9:30	Modern Family								
	10:00	Modern Family								
	10:30									
		7:00	The Middle	Brooklyn Nine-Nine	Lethal Weapon	The Mindy Project	Hell's Kitchen		Hockey Night in Canada	Nirvana, the Band, the Show
		7:30	The Real O'Neals	New Girl		Second Jen				
8:00		2 Broke Girls	Scream Queens	Modern Family	Mom			Family Guy		
8:30		The Odd Couple		Black-ish	Life in Pieces			The Last Man on Earth		
9:00		Scorpion	2 Broke Girls	2 Broke Girls	2 Broke Girls	2 Broke Girls				
9:30			Two and a Half Men	Two and a Half Men	Two and a Half Men	Two and a Half Men				
10:00										
10:30										

Canadian Programming
 Foreign Programming
 Content could be Canadian or Foreign

Sources:
 CBC Fall 2016 Schedule announced May 26, 2016 and English services Town Hall
 CTV: Fall 2016 Schedule (downloaded June 16, 2016)
 * Global: Incomplete Fall 2016 (downloaded June 7, 2016)
 * City: Incomplete Fall 2016 Schedule (downloaded June 16, 2016)

The same cable cord cutting and “Pick and Pay” pressures are affecting the funds available to support the creation of Canadian content. The CMF is co-funded by Heritage and cable companies who contribute 5% of their cable revenues. When cable revenues go down, so does funding for Canadian content, which hurts the public broadcaster more than our competitors because of our primetime Canadian content commitment.

Less advertising, less subscription revenues and less Canadian content funding is eroding our ability to deliver on our mandate.

Dated Policy Framework

As Canadian broadcasters focus on operating successfully in this new and fiercely competitive business reality, they must do so under the constraints of a dated policy model that requires investment in, and broadcast of, Canadian content that their online competitors – such as Netflix, Amazon, AppleTV/iTunes and YouTube -- simply don't have.

We now have two different realities in Canada: traditional broadcasters that are closely regulated, and that contribute to the Canadian content production industry, and new media entrants, which operate without those restrictions and contribute nothing to the funding of the Canadian cultural sector.

Similarly, now that Canadians are shifting to mobile first to consume their news, the traditional approach of measuring the hours of local TV content programmed by Canadian broadcasters in exchange for a license is problematic.

The *Broadcasting Act* is from 1991, which does not reflect today's realities, as is plainly obvious from the fact that half the sector is regulated and the other half is not. The *Broadcasting Act* needs to be updated to allow for a new governance framework for broadcasters so we can evolve in a timely way to the changes and disruption that are occurring routinely in our sector and so that we have the flexibility and rights to invest in and distribute great Canadian content globally.

It also needs to frame the expectations and commitments of participants in the ecosystem and connect the funding to such framework to make the ecosystem viable.

Competition for Quality Content is Intensifying

At the same time as our policy and funding mechanisms are breaking down, and financial support for the creation of Canadian content is declining, the competition for quality content around the globe is ever fiercer. Netflix and Amazon are no longer simply distributors sharing content. They are now major investors in programming spending worldwide.

The recently announced proposed acquisition of Time Warner by AT&T speaks to the value of original content. These large global companies no longer want to merely distribute content, they want to create it.

For example, Netflix spent about U.S. \$100 million (C \$130 million) to create two seasons of the critically acclaimed program *House of Cards*. To put that into perspective, this investment represents the entire annual budget for each of CBC and Radio-Canada's non-news programming.

We are exploring opportunities to partner with these large global companies, to invest in quality and to bring Canadian stories to a global audience. A good example of this is our upcoming six-hour screen adaptation of Margaret Atwood's *Alias Grace*, written and produced by Canadian Sarah Polley and co-commissioned by CBC and Netflix.

But these kinds of partnerships are a small part of the solution to the quality challenge. Global companies do not have an interest in Canadian culture and no reason to privilege Canadian creators among the vast global ocean of content. CBC/Radio-Canada's ability to create distinct,

Canadian programming will require our own substantial investment in our programming going forward. In the digital world, there are no cultural borders that can "protect" culture anymore. For Canadian culture to thrive it has to be good enough to stand with the best of the world.

Our focus on distinctly Canadian programming is not only on the high end of the content business. In French Canada, in particular, the strong interest in French language Canadian content requires many genres to respond to demand. We are committed to developing and producing a wide range of programming for diverse audiences at different levels of investment. This provides opportunities to bring stories to screens that resonate with specific communities **[LINKS TO LOWER BUDGET AND INNOVATIVE EXAMPLES, SUCH AS "INTERRUPT THIS PROGRAM"]** **[ALSO ADD A LINK TO "SHORT DOCS"]** and allows us to nurture emerging talent. It's important for developing tomorrow's creative leaders, especially for francophone and minority communities. **[Link to 1-2 examples for these groups]**

In the face of all of these challenges -- broken business model, out of date policy framework, declining support for Canadian content, and increased global competition for content and audiences -- the time has come for a new approach to supporting culture in Canada.

We need to invest in culture in a sustained and meaningful way through a cohesive cultural investment strategy. We need to support public broadcasting to anchor a strong and vibrant cultural economy in Canada and help grow our economy. We need a consistent approach to regulating new media entrants, in the same way as conventional media, so they both contribute to Canadian content. And, CBC/Radio-Canada needs the flexibility and global rights to grow a Canadian culture brand.

We know this strategy can work. Britain has done much of this over the last twenty-five years, with remarkable results.

IV. WHEN CULTURE IS A PRIORITY: THE BBC VS. CBC/RADIO-CANADA

In 1997, the British government identified the creative industries as vital to Great Britain's future, and committed to reversing 18 years of funding cuts. The then-Prime Minister, Tony Blair, declared his Government's "aim must be to create a nation where the creative talents of all the people are used to create a true enterprise economy for the twenty-first century"¹⁰.

The government established a Creative Industries Task Force (Creative Britain), which included a wide range of organizations from the creative and cultural industries, to assess the economic value of these industries, analyze policy and funding needs and identify ways to maximize their potential. The results of the work of the Task Force and the subsequent government investments were impressive:

¹⁰ Tony Blair, foreword to *All Our Futures*, 1999

Creative Britain initiative contributed to the growth of the UK's creative industries

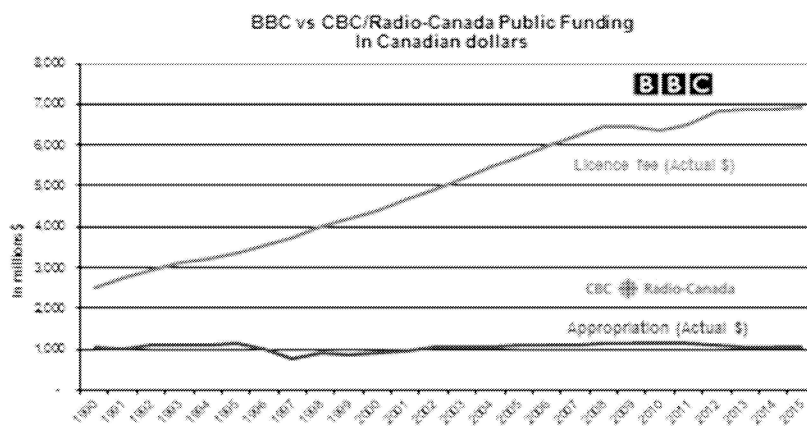
UK Creative Industries	1997	2013	% Change
Employment	931,000	1,708,000	+85%
<i>% of total UK employment</i>	<i>3.4%</i>	<i>5.6%</i>	
Gross Value Added (GVA) (measure of economic contribution)	£31.2 billion	£76.9 billion	+146%
<i>% of total UK GVA</i>	<i>4.0%</i>	<i>5.0%</i>	
Service exports*	£9.0 billion (2004)	£17.3 billion (2012)	+92%
<i>% of total UK service exports*</i>	<i>7.9% (2004)</i>	<i>8.8% (2012)</i>	

* Note: Export values for software publishing were not available in 1997, and as a result 1997 data is not directly comparable to 2012. The closest comparable year to 2012 is 2004.

Source: UK Department of Culture, Media and Sport (DCMS) – Creative Industries Economic Estimates, January 2015

The BBC lies at the heart of Creative Britain, and public funding for Britain's public broadcaster has increased significantly in the last twenty-five years, fuelling its success. In the meantime, public funding for CBC/Radio-Canada has flat-lined -- and declined in real dollars (Fig 5).

Public funding for BBC has grown significantly while CBC/Radio-Canada's has remained flat



Sources: Annual Reports and 2015 exchange rate

FIG 5: Public funding for BBC vs. public funding for CBC/Radio-Canada

Moreover, CBC/Radio-Canada has always been funded at a per person level that is significantly lower than the BBC and almost all other comparable public broadcasters (Fig 6).

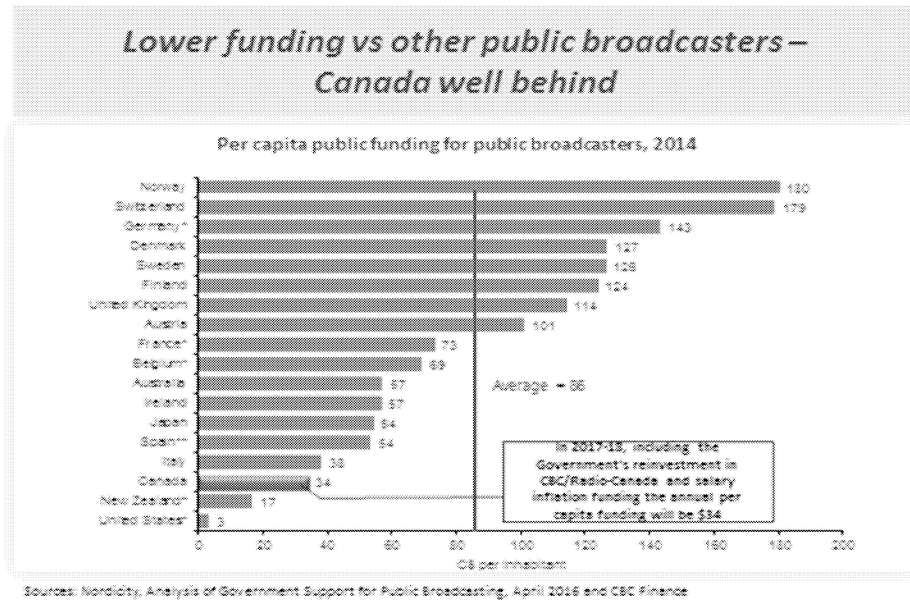


FIG 6: Public funding for CBC/Radio-Canada compared to other broadcasters

The gap between Britain's approach to cultural investment and Canada's is even more pronounced when we consider that Canada's spending on culture and broadcasting as a share of the overall economy has steadily declined over twenty-five years. (Fig 7)

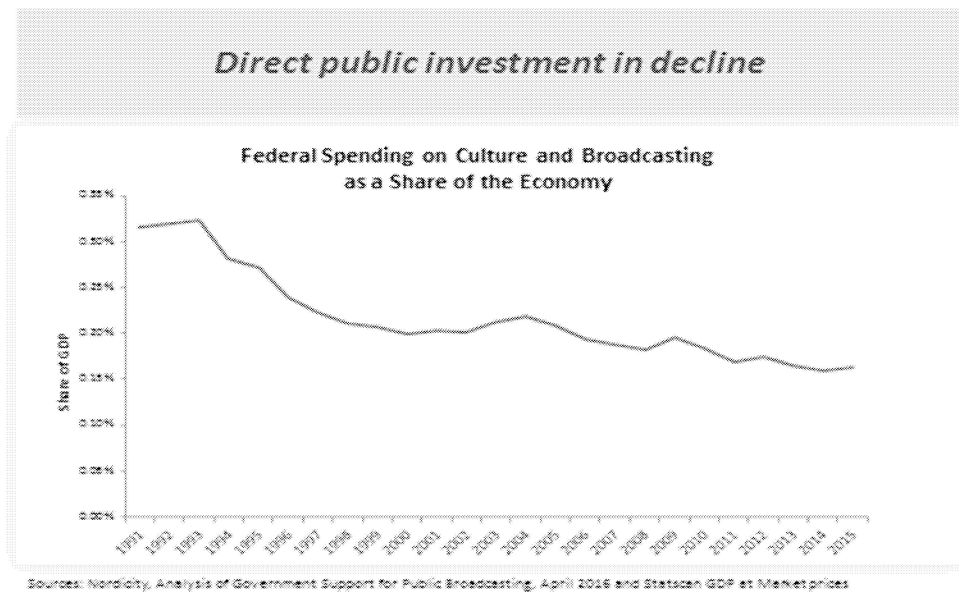


FIG 7: Federal Spending on Culture and Broadcasting as a Share of the Economy, 1991-2015

Canada can learn much from Britain’s approach to funding culture.

The BBC offers a compelling example of how a strong, stable, well-funded public broadcaster can serve the interests of domestic audiences and diverse communities, support the global ambitions of its creative and cultural sector, and anchor the strength and growth of Britain’s creative economy.

Through a combination of a cohesive culture strategy and sustained investment, “Creative Britain” is now a crucial part of the British economy, British culture is stronger than ever, and the BBC is a global symbol of quality. The BBC’s pride of place in Britain was underlined this year when the UK Government committed to new investment, including nearly half a billion dollars for the BBC World Service, as well as an eleven year charter with indexed funding for the next five years.

V. REALIZING THE FULL BENEFITS OF A PUBLIC BROADCASTER: OUR VISION

Public broadcasting has the potential to fuel our cultural ecosystem, drive our creative economy and create the kind of content that will make Canada a cultural powerhouse.

CBC/Radio-Canada wants to be able to deliver what Canadians want to see more of, and what we know they value in their public broadcaster: more non-news programming, more information to help them develop a better understanding of their world, more local programming, more investment and diversity in our radio programming, and more of the kind of

nation building events where Canadians come together to celebrate the achievements of our top creative talent.

But to do this we need to be able to invest in the critical areas that will define our future and we need stable, long-term, sustainable funding.

We put forward below a vision for our future that we believe will establish a strong foundation for CBC/Radio-Canada, anchoring our cultural ecosystem to unlock the full potential of culture for the benefit of all Canadians.

Our Vision

I. Four Priority Areas

Our focus going forward will be on four priority areas that will guide our work and our investments. We have started our transformation with our *Strategy 2020* plan. We have made significant progress in the right areas but we need to significantly deepen and intensify our efforts in the critical areas that will define our future:

- Digital innovation;
- Contributing to shared national consciousness and identity;
- Creating quality Canadian content; and
- Promoting Canada to the world.

Digital Innovation

CBC/Radio-Canada will build on our success and progress to date to continue to transform into an innovative, digital organization.

This includes investing further in our digital infrastructure, digital content and data analytics to enable us to launch more trailblazing initiatives. One example is Hamilton. Residents wanted a local CBC presence but there were no radio frequencies available. Instead, CBC created its first-ever fully online local station serving the community in a new way. Then there's our ground-breaking accessibility services, which make our content available to the four million Canadians living with disabilities that restrict their access to digital content. [link to two separate links: 1) on describing *The Current's* Accessibility project and 2) <https://io.cbrc.ca/?lang=fr#/newsDetail/4-millions-de-canadiens-n-arrivent-pas-a-consulter-nos-contenus-sur-radio-canada-ca-1.3410282>] It includes creating a more personalized and interactive user experience with products designed for rapid continuous iteration on multiple platforms and adaptable to emerging media formats. Projects like Radio-Canada's "Prochaine Génération" will ensure that a new generation shapes what the form, content and platform for the news of tomorrow will look like; the "Espace Autochtones" digital portal provides a unique window on the realities of Indigenous people in Canada.

Version October 27 @ 2:45 pm

Our plans are exciting and ambitious: We will have a strong Canadian owned and operated multi-platform service that enables rich contribution, participation and engagement with our audiences. We will continue to expand our reach by sharing our digital content on third-party platforms such as YouTube and Facebook, where audiences can now watch programs like *The National* or *Téléjournal (Ottawa-Gatineau)* live each evening.

We will create a range of digital content that meets the needs of Canada's diverse populations and work with an ever-broadening range of independent creators to ensure a plurality of voices.

We will grow the innovation economy. Our vast audience and data sets and our digital platform can be used for rapid testing, insight gathering and deployment of new content and features, generated both internally and in partnership with independent and diverse creators, start-ups and educational institutions.

Contributing to Shared National Consciousness and Identity

CBC/Radio-Canada will continue to be the catalyst and facilitator of relevant conversations in Canada. We are committed to being a "gatherer", bringing Canadians together around community issues and local cultural experiences, to be at the heart of Canadian conversations.

Canadians' individual communities of interest increasingly share their time and views with others whose views are similar. In this environment, Canadians risk becoming increasingly isolated from broader conversations that shape our sense of who we are as citizens rather than consumers. We can't take social cohesion for granted – we must work at it every day.

CBC/Radio-Canada will continue to be an enabler of social cohesion, giving Canadians unparalleled access to information and programming that reflects a diversity of voices and

perspectives. Our newly launched opinion site on CBCNews.ca, represents the widest range of viewpoints available in this country and showcases opinions from established writers and thought leaders, as well as a new generation of thought leaders. [add a LINK from RC]

We will also create and showcase more local and national events; cover more issues of national interest; and provide the virtual meeting place for Canadians to listen to one another, to be heard, and to reflect on our society. As many others move away from virtual meeting places because of the complexity in supporting civil discourse, CBC/Radio-Canada is committed to supporting these forums as part of connecting Canadians across the country around issues that matter.

Creating Quality Canadian Content

CBC/Radio-Canada will create, produce and partner with Canadian cultural entrepreneurs to offer more quality Canadian content than ever before, in both official languages and a spectrum of Indigenous languages. We will create a range of content and formats that can be shared with the world. We will shine a brighter spotlight on our great Canadian music talent. [LINK to MSO with Fred Pellerin, Céline Dion or En direct de l'univers] We will invest in our future audiences, creating more programming for young Canadians -- children, teenagers and young adults -- who are more diverse than any previous generation in our country.

In the future, content will be found in either short digitally produced and distributed form, or longer form audio and audio-visual content that meets the standard of premium content being set by the world's best. Its distribution will be multi-platform and in many forms, and enhanced via virtual reality or a significantly more intense audio-visual experience. Initiatives like Radio-Canada's *La route des 20* and iBook *Charlebois, par-delà Lindberg* are already moving in that direction.

The stronger the CBC/Radio-Canada platform and brand, the more content can be amplified to audiences across demographics and borders. We are well positioned to support content creators across the country, supporting innovation and risk taking. We did this with *Série Noire* [LINK] now in its second season, *Unité 9* [LINK] now in its fifth season, our newest hit, *Kim's Convenience* [LINK], with its uniquely Canadian take on the immigrant experience and our prime time and commercial free broadcast of *Secret Path* [LINK]. We did this with our Emmy nominated short documentary series *Interrupt this Program*, [LINK] about the role of the arts as a tool for social change in different countries.

As part of the value we bring, we are able to make our audience insights available to creators to inform and validate their creative decisions. This in turn can help to create more Canadian content that reflects more diverse voices.

Promoting Canada to the World

Canadians are incredibly proud of this country and its strong global brand. At a time when the world is increasingly interested in Canada, CBC/Radio-Canada is poised to champion the promotion of world-class Canadian content and cultural entrepreneurs to the world.

Working with other cultural organizations in Canada – from our screen based partners like Telefilm, the CMF and the NFB, to our museums, galleries and performing arts organizations -- we will combine our strengths to promote Canadian content. While we already partner with many of these organizations, our aim is to develop a collective approach to growing our global culture brand.

The international marketplace for content is more crowded than ever. We know we can do more to help promote Canada and Canadian creativity on the global stage. Indeed, we are currently involved in discussions and partnerships with other public broadcasters like Australia's ABC and France Télévision to create a global digital Business to Business (B2B) marketplace that will allow us to reach others' content and distribution platforms. We have already shown, with our successful public broadcaster's global conference (PBI) in Montreal this September, that we can play a leadership role within this community. We are a natural bridge between Canadian creators and an international network of broadcasters who share a set of values around quality, distinctiveness and public service.

With over 10,000 hours of Francophone and Anglophone TV and Radio programs distributed every year to hundreds of clients and partners nationally and internationally, we are well established in the distribution marketplace. Around the world, documentary is known as "Canada's art form", just one example of the international respect for one of the genre's we do so well. Under the brand of CBC/Radio-Canada, and in partnership with other distributors of content, we will drive efforts to ensure our creators are showcased to audiences around the world. We will do this with content and also original formats, such as our initiative with Warner Brothers to create original Canadian formats that can be exported worldwide.

CBC/Radio-Canada's digital platform and our partnership strategies already enable us to reach audiences around the world. Eighteen CBC Radio programs, including Piya Chattopadhyay's new show, "*Out in the Open*", which tackles the tough issues of our time, are distributed widely to public radio across the U.S. With additional flexibility, including additional global digital rights and resources to market outside of Canada, our ambition to bring the best of Canadian content to the global stage can be realized.

II. An Ad-Free Funding Model

CBC/Radio-Canada aims to build its future of public broadcasting in this country on a strong and stable foundation. The idea of an ad-free public broadcaster has long been discussed and debated; indeed in February 2008, the Standing Committee on Canadian Heritage recommended that CBC/Radio-Canada negotiate with government a transition to an ad-free business model. More recently, it has been a focal point in the cultural consultations.

This summer's Tragically Hip concert, uninterrupted and shared for Canadians everywhere, lauded nationally and internationally, [\(LINK TO QUOTES\)](#) offers a compelling vision of what is possible.

An ad-free funding model would allow us to deepen our work around our public service mandate allowing us to become a stronger and more valuable partner to communities, creators and cultural organizations.

It would fuel risk taking in content and format creation and would create greater opportunities to find and nurture new talent. It would allow us to create more distinct Canadian programming, made by Canadians, featuring Canadians and telling the stories Canadian creators want to tell.

It would allow us to focus less on commercial impact and more on cultural impact, exploring more ways to help Canadian content and creators thrive and grow. We would be able to commission programming that has the time to find an audience without being overly driven by the need to deliver immediate success.

We would be able to tackle stronger and more distinctive content, including the kind of complex story telling that is difficult within a format that includes commercial interruptions.

All of this would strengthen the creative sector and creative economy, in part because it would increase our creative appeal to Canadian directors, writers and producers. It would also make us a better partner as our focus would be more firmly on the needs of citizens, creators and our industry partners without the constant preoccupation of monetizing each of our initiatives, each hour, on our TV programming schedules and being perceived as “competition” by the other participants in our ecosystem.

Beyond the social and creative benefits, working with noted media policy and economic analysts Nordicity, CBC/Radio-Canada also explored the economic impact of an ad-free model, with important and thought-provoking results:

The Economic Impact of an Ad-Free CBC/Radio Canada

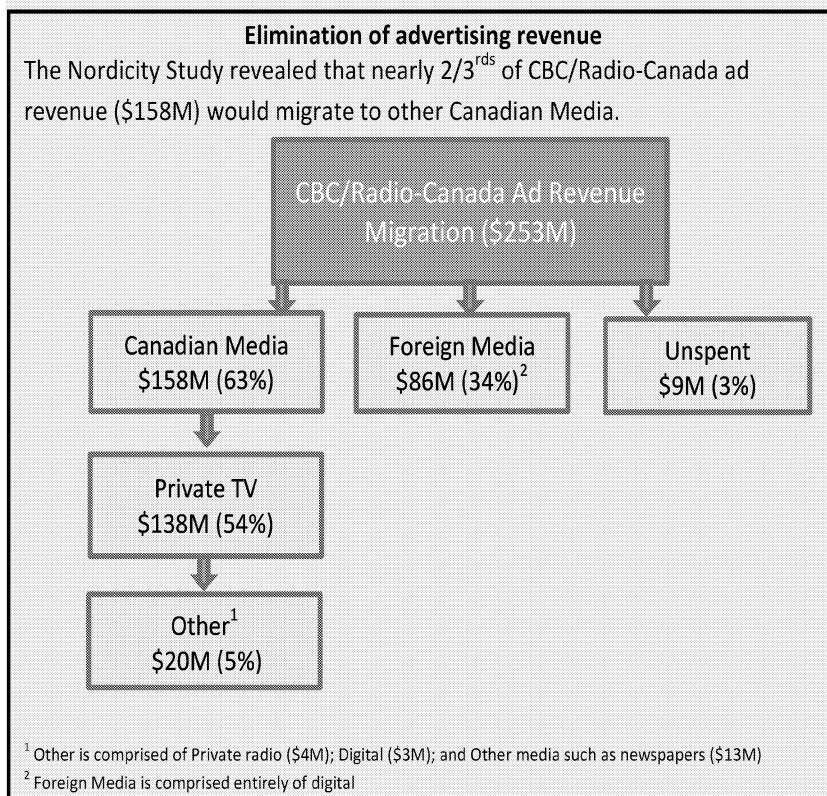
Economic Upside

The economic upside of moving to an ad-free model would be a net total GDP gain of \$488M, a total labour Income impact of \$355M and the creation of 7,200 new jobs in the creative sector.

The gains are as a result of CBC/Radio-Canada’s strong support of Canadian production talent. CBC/Radio Canada’s spending benefits independent producers and other Canadian third party suppliers, and also creates a ripple effect of spending throughout the economy.

Impact on CBC/Radio-Canada and the Sector

In terms of costs, the ad-elimination model would yield a net loss in advertising revenue of \$253M to CBC/Radio-Canada. However two-thirds of this revenue would migrate to other Canadian media, including private TV and digital, for a net gain to them of \$158M.



Further economic impacts would be generated by the fact that part of the migrated ad revenue would be spent on independent production by private broadcasters with the new ad money and by programming commissioned by CBC/Radio-Canada to replace the lost advertising minutes.

Replacement Funding

In order to exit advertising, CBC/Radio-Canada would require \$318M in replacement funding. This figure takes into account the lost advertising (\$253M) as well as the cost to produce and procure additional Canadian content (\$105M), and the cost savings associated with the reduced cost of sales (\$40M).

Lost conventional and speciality television and digital advertising	\$253M
Costs to produce or procure additional Canadian content to replace the advertising time	\$105M
Less the cost savings associated with the reduced cost of sales	(\$40M)
Total net required replacement funding	\$318M

Funding a Better Future

The Investment

CBC/Radio-Canada's vision involves a new approach to funding Canada's public broadcaster, one that we believe is crucial to growing our creative economy. This includes an investment in our priority areas along with replacement funding to move away from advertising as a source of revenue. In total, we propose an increase in our government funding of \$12 per person to bring our funding to \$46 per Canadian from the current amount of \$34.

Funding Proposal

	\$ Per Person	\$millions
Government Funding today	34	1,215
Add: Replacement of Advertising Revenue	9	318
Add: Additional Funding of New Investments to Face Consumer and Technology Disruption	3	100
Total Proposed Government Funding	\$46	\$1,633m

Assumptions:

1. Ongoing inflation adjustment mechanism
2. Excludes subscriber and other self generated revenue
3. Replacement of Advertising revenue is estimated as 2014-15 Ad Revenue of \$253M+ cost of replacement programming of \$105M less the reduction in cost of sales of \$40M

For every incremental increase of \$100M in CBC/Radio-Canada funding, \$211M in gross value (GVA) is added to the Canadian economy.¹¹

The amount of \$46 per person equals the 2008 recommendation of \$40 per person by the Standing Committee for Canadian Heritage, which when adjusted for inflation in today's dollars is \$46. This would make Canada the fourth lowest funded public broadcaster, among comparable public broadcasters in the world, up from third lowest.

VI. OUR RECOMMENDATIONS

We have outlined in this paper the value of our work for Canadians, the challenges as global companies and consumer trends dramatically alter the broadcast and media landscape, and the remarkable opportunities for our cultural and creative industries and public broadcasting to make Canada a cultural powerhouse.

Our recommendations below address the critical issues that need to be solved if we want Canadian culture and public broadcasting to become a true source of social and economic strength for this country.

Recommendations

1. Develop a cohesive cultural investment strategy. This strategy would include:
 - A Canadian cultural industries council, using Creative Britain as an inspiration;
 - A coherent policy framework to regulate conventional broadcasters and new media entrants evenly, including a mechanism for new media entrants to support Canadian content; and

¹¹ Economic Impact of CBC/Radio-Canada. Deloitte June 2014

- The flexibility to allow CBC/Radio-Canada to invest in Canadian creators and promote Canada globally, including more opportunities for investment in content and distribution.
2. Increase per person funding to the CBC/Radio-Canada to \$46 -- an increase equivalent to \$12 per Canadian. This is the inflation adjusted per person funding recommended by the Standing Committee on Canadian Heritage in 2008. This will enable CBC/Radio-Canada to make the necessary long-term investments to complete our transformation, move away from advertising as a source of revenue and anchor our cultural ecosystem.
 3. Depoliticize CBC/Radio-Canada funding so that it is predictable and stable, tied to the existing 5-year licence cycle, indexed to inflation, and separated from the election cycle and annual government budget cycle. This would be similar to how the BBC now operates. Indexation is critical -- without it, inflation of just 1.5% per year would erode the new government funding of \$150 million to zero in just 6 years.

VII. CONCLUSION

The Government's desire to strengthen Canadian content creation, discovery and export in a digital world, and modernize how it supports Canadian culture is timely and critically important. Canada has the potential to be a global cultural powerhouse, to grow Canada's economy and quality of life, but bold action is required to realize this ambition.

As Canada's public broadcaster, CBC/Radio-Canada has long been at the very heart of Canada's cultural ecosystem. We are proud of our significant contribution to Canadian culture, and embrace the opportunity to do much more to ensure that strong, distinctive Canadian content thrives amongst a sea of choice, and that Canadians are able to discover the unique voices, perspectives and creative talents of our nation's people.

But we are at a critical juncture in our evolution, continuing to operate under a business model and cultural policy framework that is profoundly broken. At the same time, other nations are moving their cultural agendas forward successfully – and reaping the benefits of strong, stable well-funded public broadcasters.

With support for our ambitions as outlined in this paper, we can drive the creative sector and the creative economy in Canada more effectively and more widely than any other government intervention. We can become an exceptional partner within the creative community, working with both private and publically funded organisations to create and champion Canadian content and creators. We can better leverage our vast reach and the success of our digital network and data insights.

We urge the Government to accept and adopt CBC/Radio-Canada's vision and recommendations for Canada's own public broadcaster. We believe we have an important role to continue to play, in serving the interests of all Canadians and helping drive the global ambitions of our great nation. We are poised to support the realization of Canada's cultural agenda. The world is changing, and we are ready.